Quantum

The complete integrated family forms and orders package

Mr Justice Mostyn and Maggie Rae

User Manual

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CLASS LEGAL
Owl House,
The Barns, Carr Farm,
Cadney, Brigg
DN20 9HP

User Manual v.2014.1

Tel: 01652 652 222
Fax: 01652 651 050
Email: info@classlegal.com
Website: www.classlegal.com

Technical requirements for Quantum

Computer environment:
Any computer running Windows XP or later

RAM: 1GB

Hard disk space: 25MB for installation
(i.e. excluding saving of files)

Monitor: Colour. Minimum screen resolution 1024x768.
1280x720 recommended.

Printer: Laser printers recommended

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Telephone helpline

We hope you find **QUANTUM** easy to use. However, if you have any questions at all, either installing or using the program, our expert helpline would be delighted to help you.

Call us between 9.30 am and 5.30 pm on

01652 652 222

Installation

Step 1

If you have been sent an email, please click on the 'Download Quantum' link within in and then proceed to Step 2. Otherwise, follow the instructions below:

1. Type 'www.classlegal.com' into your internet browser window
2. Go to 'Products' and find your version of **Quantum** (Family Forms or Premium)
3. Select 'Buy' and then either click on the blue link under ***Downloads (trial)*** (if you have not run **Quantum** before) or on the appropriate blue link under ***Downloads (updates)*** if you are updating **Quantum**.
4. Depending on what operating system you are using, you may be asked whether you wish to ***Run*** or ***Save***. Select ***Run***.

Step 2

Follow the on-screen instructions to install **Quantum** on your machine

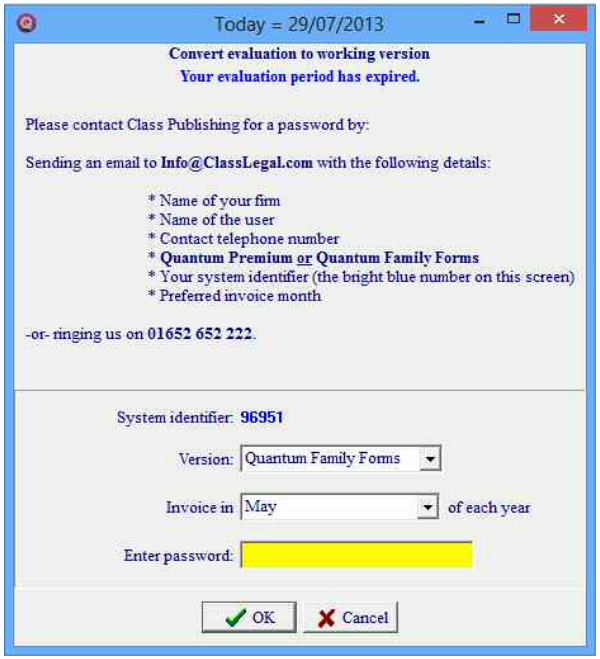
Step 3

Before running the program for the first time you may be asked for a password (you won't be if you are still on your free evaluation period).

This password is generated by us from a unique system identifier of your computer. **Quantum** finds and displays this for you when you first go into the program.

Either email us (info@classlegal.com), call us (01652 652 222) or fax us (01652 651 050) with the following information:

1. The system identifier
2. Whether you want to use **Quantum Family Forms** or **Quantum Premium**
3. The month you want to be invoiced (If you don't have a preference, don't worry, we will work it out from your records.) We will then give you your unique password for the bottom of the screen. You only have to do this once to activate your annual licence.


Today = 29/07/2013
Convert evaluation to working version
Your evaluation period has expired.
Please contact Class Publishing for a password by:
Sending an email to Info@ClassLegal.com with the following details:
* Name of your firm
* Name of the user
* Contact telephone number
* Quantum Premium or Quantum Family Forms
* Your system identifier (the bright blue number on this screen)
* Preferred invoice month
-or- ringing us on 01652 652 222.
System identifier: 96951
Version: Quantum Family Forms
Invoice in May of each year
Enter password:
OK
Cancel

(Note: if you are installing **Quantum** onto more than one computer, you can go through this procedure for each one. However it may be easier, if you want to install **Quantum** to multiple machines, to use the Windows Installer program. If so we can send you a .MSI file to install. Please call the Helpline on 01652 652 222 for further details.)

Terminal services users

QUANTUM is designed to be run as a stand-alone program accessing shared files across a server. However, many sites successfully run **QUANTUM** in a terminal services environment. If you would like to install and run **QUANTUM** in such an environment, please note the following.

QUANTUM must be published to each user's virtual space. (i.e. you cannot install **QUANTUM** on the server and provide multiple access to a lone installation of the program). For example, you might create a folder (for each user on the server) with the required security access rights. **QUANTUM** will be installed to each folder.

You may wish to call the Helpline (01652 652 222) for information on password control in a terminal services environment.

Multiple installations

If you want to install **QUANTUM** to multiple machines, using the Windows Installer program, then we can send you a .MSI file instead of an .EXE file.

Please call the Helpline on 01652 652 222 and they will arrange for you to be sent the .MSI file for each new update.

Global settings (useful for sites with multiple users)

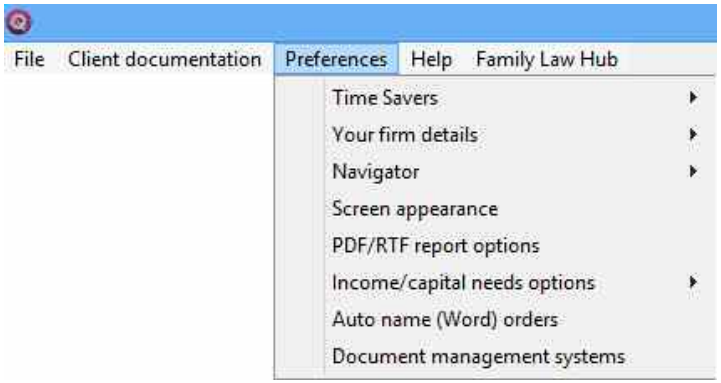
1. Most of the customisation settings are stored in the qjump.ini file in the installation folder (`c:\classlegal\quantum\ver(x)\Solicitor by default`)
2. The settings should be finalised on one computer and then the INI file copied across to all other users' machines. *(Warning: although settings can be standardised throughout the firm using this method, note that individual users will still be able to override these settings if they so wish.)*
3. Settings that sites with multiple users may want to standardise:
   a. To integrate **QUANTUM** with a supported document management system (see ***File/Preferences/Document management systems***)
   b. Name of the income needs template which will be loaded when a blank form is printed (see ***File/Preferences/Income/Capital needs options***)
   c. Quantum Print options (see ***File/Quantum Print Options***)
      i. How additional pages are numbered
      ii. Automatically fill blank sections with 'N/A' (or something else)
      iii. Date format
      iv. Font (a changed font for the prescribed forms in addition to data entry) *(Warning: do not make font size bigger than 11 point, and test all pages of all forms before rolling out)*
      v. Footer *(Warning: if an image is going in the footer make sure that image file is available on all users' machines)*
   d. Valuation dates
      i. Share prices
      ii. Date of exchange rate
   e. Income capital needs - lines separating items
   f. Whether client is allowed to modify the PDF and RTF files (see ***File/Preferences/PDF and RTF options***)
4. Firm details
   a. One user should go to Preferences/Your firm details/Address and enter the firm's name and address.
   b. The files `YourFirm2.db*` then need to be copied to all

users' machines in each office

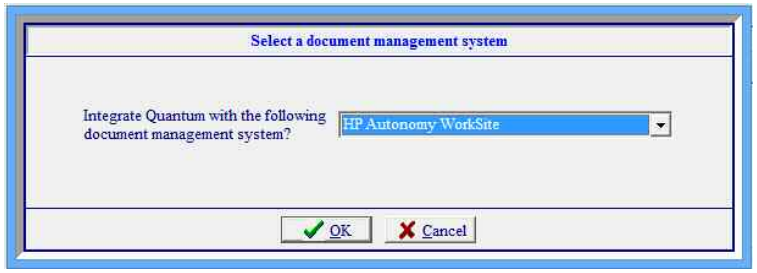
(Warning: this shouldn't be standardised across the firm if there are different offices)

Integrating with document management systems

Select ***Preferences/Document Management*** from the Main Menu

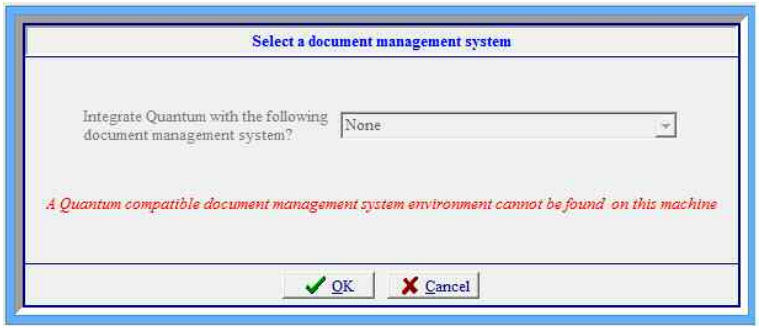


If you have a document management system that integrates with **QUANTUM** installed on your machine, then you will be able to see it in the drop down list box:



Select ***OK***.

If **QUANTUM** doesn't detect a document management system that it integrates with, you'll see this message:


Select a document management system
Integrate Quantum with the following document management system?
None
A Quantum compatible document management system environment cannot be found on this machine
OK
Cancel

Apple Mac users

QUANTUM is a Windows program but it can be run on an Apple Mac if you use Windows emulation software. Examples of such software are Virtual Box and VMWare Fusion. Contact your local Apple Store if you need further help.

Before you start – your firm's address and fee-earners

Address

Click on ***Preferences*** then ***Your firm details*** and ***Address***. Enter the relevant information and it will then either be printed automatically in the appropriate sections of the forms or you will be given the option of inserting it, as relevant.

Fee-earners

You can create a database of your firm's fee-earners here. This can then be used when completing forms (such as Forms H1 and N260) which ask for fee-earners' names and hourly rates, rather than inputting the same information each time you do such a form.

Enter the fee-earner's details (name, status, grade and hourly rates) and click OK.

Remember to update the database as your fee-earners and their rates change!

The navigator explained

In **QUANTUM**, the screen is divided into two parts.

On the left is a list of all the forms and sections within the program. Use this list (or 'navigator') to move from module to module.

You can type into the ***Find*** box at the top to locate any part of a form or a tool.

Use the drop down list under ***Display*** to choose which forms or section you want to see on the navigator.

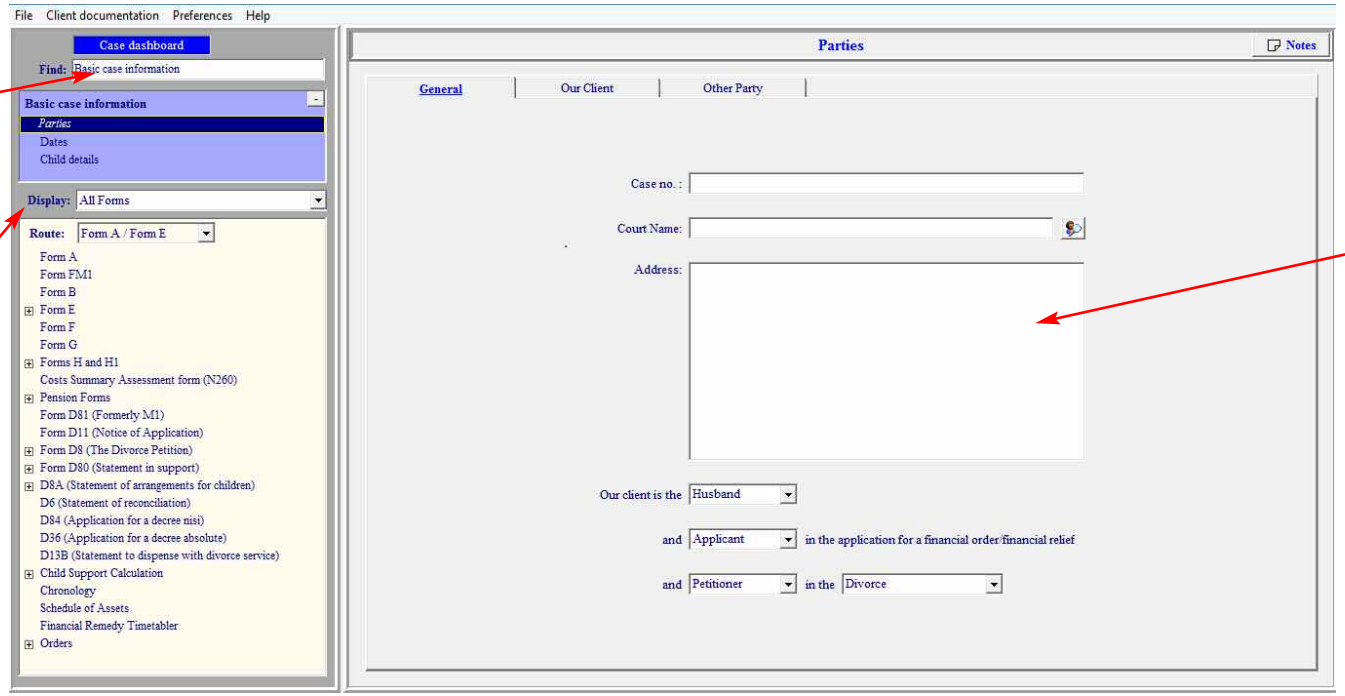
Whichever section is highlighted on the navigator will appear on the right of your screen.

Further information

You can change the way the navigator displays modules by clicking on ***Preferences*** and then ***Navigator***. Select ***Organise*** to switch the Form E display between sections and pages. ***Expand all*** and ***Collapse all*** show and hide respectively all the subsections of the modules. The program will remember your chosen ***Navigator*** options and use them the next time you run **QUANTUM**.

Type into the Find *box at the top to locate any part of a form or a tool*

Choose which forms or section you want to see



Whichever section is highlighted on the navigator will appear on the right of your screen

Basic case information

One case in **QUANTUM** can have numerous forms within it – i.e. D8, D8A, Form A, Form E, pension forms, costs forms, D81.

This section of the program is where information that is relevant to more than one form (i.e. your client's name) should be entered.

The section is split into 3:

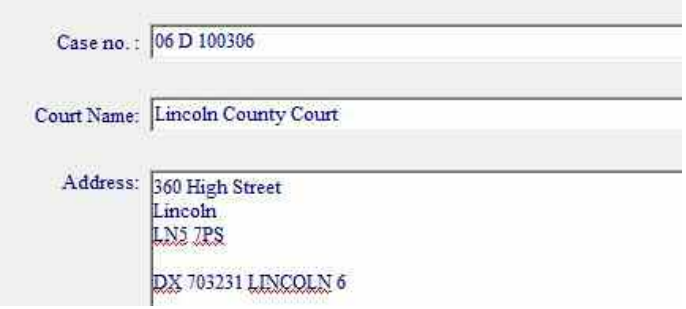
- Parties
- Dates
- Child details

Parties

Here, as in many other parts of the program, you'll see the right hand screen is divided into tabs – click on the top of each tab and that one comes to the front.

In ***General***, enter the case no, and then click on the icon next to the ***Court name*** box to search for and insert a court name and address.

Note that next time you go into the Courts database the court you last selected is displayed (of course you can then choose another if you need to!).



Click on the icon next to the Court name box to automatically search for and insert a court name and address

Select your client's sex, status in the divorce and in the financial proceedings by clicking on the dropdown arrow to the right of the answer box, and the selecting the appropriate answer.

Our client is the Wife
and Applicant in the application for a financial order/financial relief
and Petitioner in the Divorce
Petitioner
Respondent

(These dropdown boxes are used throughout **QUANTUM**.)

In ***Our client*** and ***Other party*** enter as much information as you have – leave anything blank that is not relevant, or which you want to come back to and enter later.

Dates

Enter any applicable dates here, leaving others blank as necessary.

Note that although in general date boxes will only accept valid dates, there are a few alternatives you can type into the 'DD' box that will appear on the printed form:

- N/A
- ???
- ??
- ?

You can also leave the date blank, or add a month and year only or a year only.

Your client's date of birth: 03 11 1965
Date of your client's marriage: 12 06 1997
Date of your client's separation: 04 07 2011
Date of petition: N/A

Child details

This is the first example of a list box in **Quantum**. List boxes allow you to enter as many instances of an item as are needed – i.e. there might be 1 child, or 6, or none.

To enter details of a child, click ***Add*** and complete the boxes that appear. When you have finished, click ***OK***. If you want to go back and change any information you have already entered, click ***Modify***, make the change and then click ***OK*** again.

(Note you are asked whether your client receives child benefit for the child – if you say 'Yes', **Quantum** will automatically insert this, at the full amount, in the ***Income from benefits*** section of Form E, or ***Income*** section of Forms E1/2 as appropriate. See the section on ***Preferences/Time savers*** for more information.)

If this case is using the standard Form A / Form E route (see the next section ***Route selector***) then this is all you need to do here.

If this case is using either the Form A1 / Form E1 or Form A2 / Form E2 route, or if you will want to carry out a child support calculation involving shared care (see the section on ***Child support calculations***) then click the blue ***Show questions needed…*** button and answer the further questions about children required by Forms A1, E1 and E2. This means you will have dealt with all children questions here, and won't need to remember to answer them separately in these forms.

As they appear so frequently, list boxes are also covered later on in this manual.

You can enter a general note about the children in the ***Any additional information*** box. This will appear on the printed form under the details of the individual children.

Route selector

As Form E has been joined by Form E1 and Form E2, each of which have their own associated Form A, Form A1 and Form E1, there is a choice of 3 different routes you can take in **Quantum**:

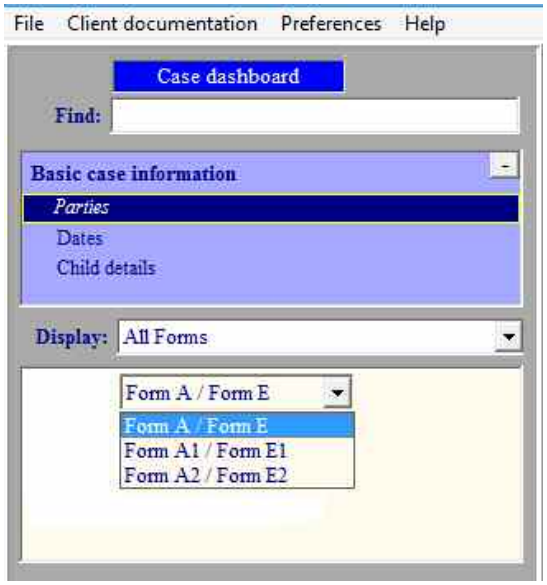
Form A and Form E (most applications in county courts)

Form A1 and Form E1 (some applications in county courts, notably Schedule 1)

Form A2 and Form E2 (applications in the magistrates' court)

Form A / Form E will be the most used route and is set as the default – that means that this route is selected each time you open a new case.

To change to another route, click the drop down arrow to the right of 'Route'.



You can change the route of a partially completed case. Data you have already entered will be copied across as relevant.

Each time you open an existing case, **QUANTUM** will remember the route you were on when you worked on the case last, and keep to that.

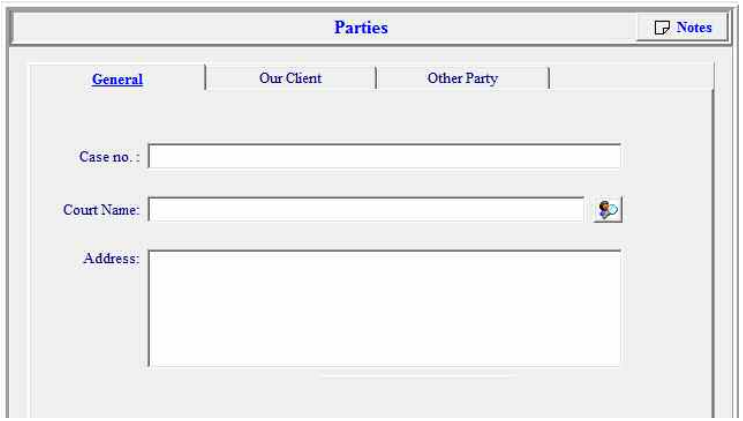
Expandable forms

Whenever you might want a form to expand beyond the prescribed Court Service format (i.e. when you want to enter more text than a box allows), or we think there is something **QUANTUM** can do to help you (i.e. perform calculations) then that form is in an intelligent, expandable format.

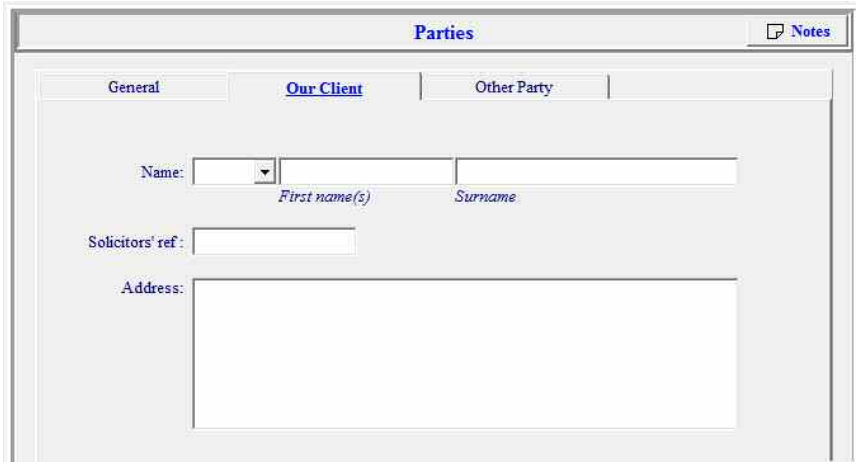
Within that format there are several types of data entry, which you will find throughout **QUANTUM**.

Tabs

Whenever you see tabs in **QUANTUM**, click on the top of each one to bring those questions to the front.



Above, the ***General*** questions in ***Parties*** are selected.



When you click on ***Our Client***, those questions are then displayed.

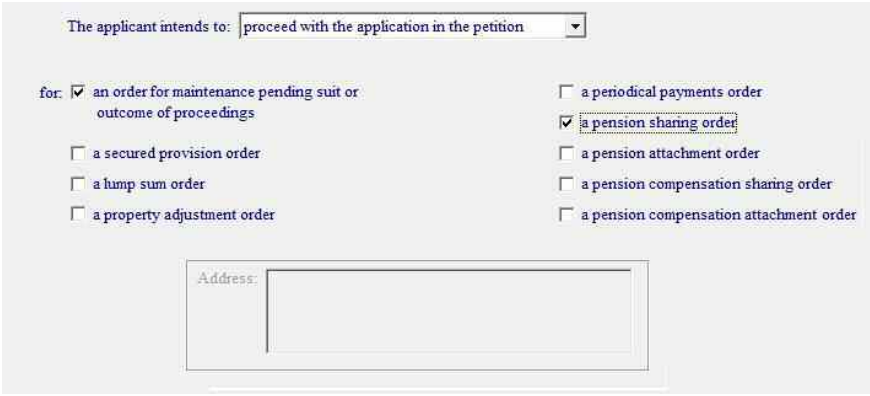
Dropdown boxes

These dropdown boxes, indicated by an arrow at the right of the answer box, are used throughout **QUANTUM**.

Click on the dropdown arrow, and then select the appropriate answer.

Tick boxes

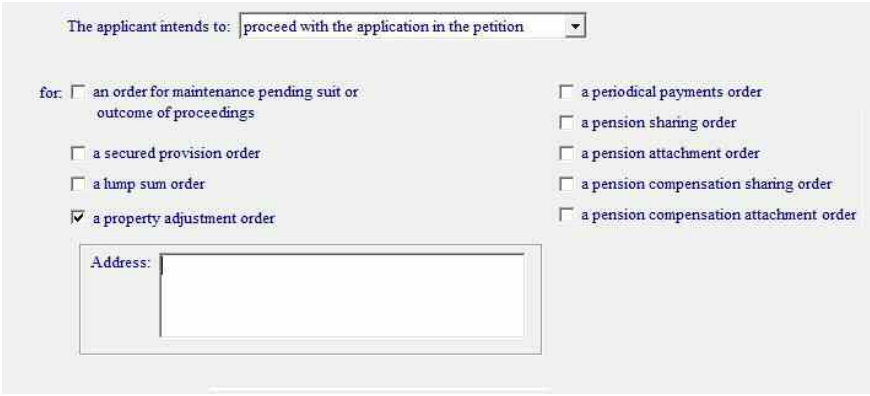
Click on an option to select it and a tick will be inserted. Tick as many as are appropriate.


The applicant intends to:
proceed with the application in the petition
for:
an order for maintenance pending suit or outcome of proceedings
a secured provision order
a lump sum order
a property adjustment order
a periodical payments order
a pension sharing order
a pension attachment order
a pension compensation sharing order
a pension compensation attachment order
Address:

Note that the box 'Address' under 'a property adjustment order' is greyed out above, stopping you from entering anything there.

Wherever you see areas that are greyed out (disabled) in the program, it is because a selection you have made, or not made, renders that area unnecessary.

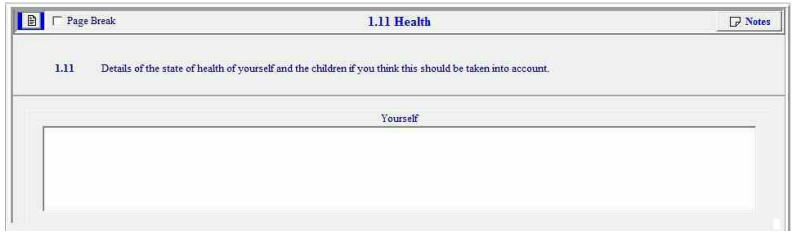
In this case, once 'a property adjustment order' is ticked, 'Address' is no longer greyed out, and you can type into the box.


The applicant intends to:
proceed with the application in the petition
for:
an order for maintenance pending suit or outcome of proceedings
a secured provision order
a lump sum order
a property adjustment order
a periodical payments order
a pension sharing order
a pension attachment order
a pension compensation sharing order
a pension compensation attachment order
Address:

Text boxes

Select a section such as ***Health*** from Form E twig of the the ***Navigator*** and it will appear on the right of the screen.

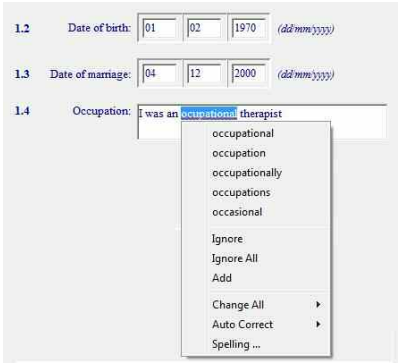
Wherever you see a white box, type directly into it. You can enter as much information as you want – that box on your printed report will expand as necessary.


Page Break
1.11 Health
Notes
1.11 Details of the state of health of yourself and the children if you think this should be taken into account.
Yourself

Wherever you see a white box, type directly into it. You can enter as much information as you want – the box will expand as necessary.

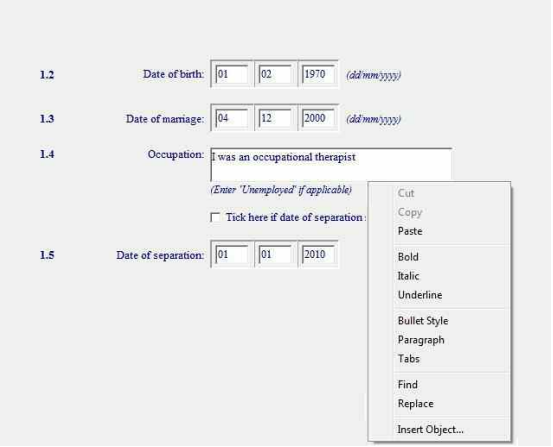
Spell checking in text boxes

If you see a red squiggly line under a word, it means that it may be spelt incorrectly. If you wish to correct it, right hand click with your mouse, and a list of suggestions will appear. Select the replacement you wish to use.



Formatting text boxes

Sometimes you may wish to emphasise certain words by using formatting such as bold or italics. Select the text you wish to format and right click with your mouse. The formatting menu will appear as follows:



(Note that if there is a possible spelling mistake in the text box the formatting menu will not appear as the spell checker takes priority.)

You cannot individually change the font type or size in a box, as **QUANTUM** makes sure that the overall font of the printed form is consistent. If you wish to change the default font then you must do it for all the forms and reports. To do this, go to ***Quantum Print Options*** on the top menu (there is a section on printing later in this manual).

List items

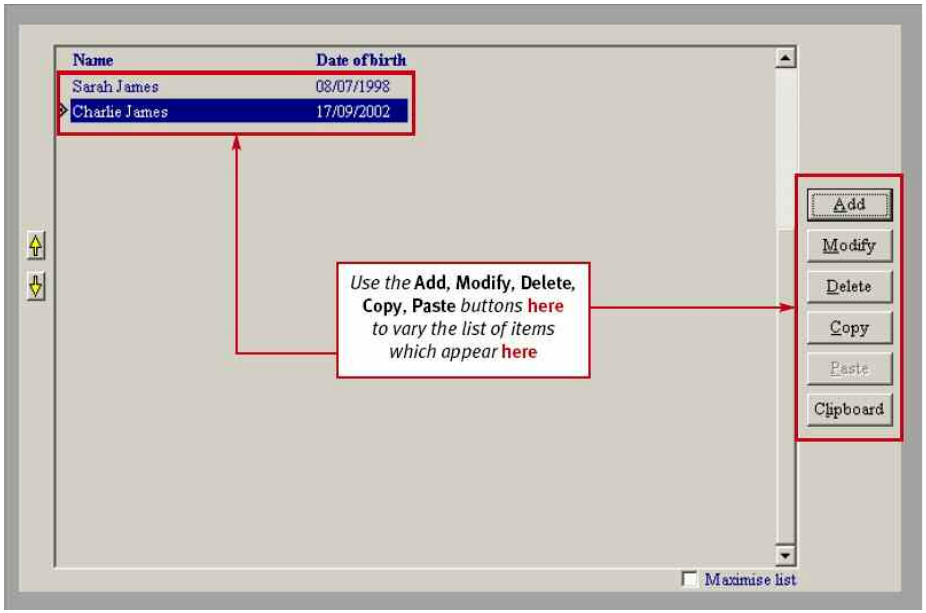
Where there is the possibility of multiple items (i.e. children, bank accounts, other properties) all with their own questions,

you will see item boxes and a list of buttons to the right of them. The buttons allow you to add, modify and delete items.

Select ***Add*** to add a new item; ***Modify*** edits one already entered; ***Delete*** removes one. ***Copy*** copies an existing entry so you can ***Paste*** it back in – useful if you have an item similar to another, and you need to make a small change only.

When the screen comes up, type into the white text boxes as described above.

The ***Clipboard*** button allows you to transfer all the data displayed in the item box to another program such as Word or Excel.



The yellow arrows allow you to re-order listed items: highlight the item and then move it

Calculation boxes

The values you enter in these green boxes are the ones **QUANTUM** detects and includes in all the running totals (and eventually in the ***Financial Summary***).

QUANTUM automatically keeps a running total of each figure you enter into a green box.

It picks up all the figures you have entered in the green boxes and forwards them to the relevant total.

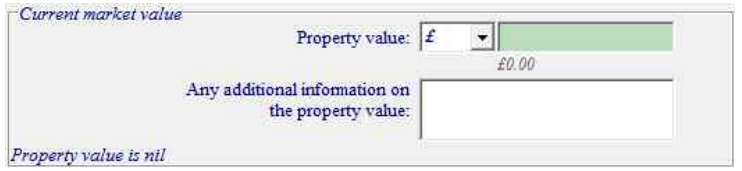
(For example, as you enter information on the matrimonial home, the mortgage amount will be deducted from the current value figure, and your client's share of the total asset value will be apportioned according to their share in the home. This figure will then be placed in Total A on page 4 and in the ***Financial Summaries*** on page 19.)

There are a couple of rules that you need to adhere to when entering data into these green calculation boxes:

Enter figures only (**do not** enter commas or any other character) – enter 100000, **not** 100,000

Do not enter currency signs – enter 100000, not £100000

Don't worry about formatting numbers with currency signs and commas, as these will be automatically inserted in the printed forms.



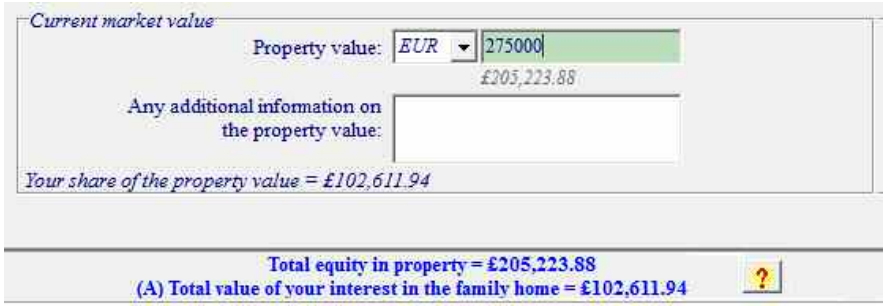
To check your entry, the figure you have entered will appear as it will be printed formatted below the blue box as above.

Currency

In all green calculation box sections you can specify the currency you want to enter. Choose the currency from the drop down list (you can add to these – see ***Exchange rates*** in the ***Preferences*** section) and then add the value.

You will see a sterling conversion performed immediately.

Select currency *Enter amount*


Current market value
Property value:
EUR
275000
£205,223.88
Any additional information on the property value:
Your share of the property value = £102,611.94
Total equity in property = £205,223.88
(A) Total value of your interest in the family home = £102,611.94

(The date of the exchange rate used for the conversion will be automatically printed on the form. If you *don't* want it to appear go to ***Preferences/Time Savers/Exchange*** rates and uncheck the box.)

IMPORTANT NOTE: The exchange rate used in this calculation is down to you to update! You will be reminded to do so whenever you open a case containing a non-sterling currency.

For information on how to update currency values, and add new currencies, see the section later in this manual on ***Preferences/Time Savers/Exchange*** rates.

Shares

There is a weblink in **section 2.4** which allows you to find the latest quoted price, and then paste this into the 'Current value' box. (You can change the weblink to any valuation site you choose.)

Click the calculator icon to work out the holding value.

(Note that the date you enter the share unit value will be printed on your report unless you turn this off – see ***Preferences/Time Savers/Share prices*** for further information.)

Additional information boxes

Although you can enter an infinite amount of information into the forms, there are also specific ***Additional information*** entry boxes both under many of the calculation boxes and at the end of each section.

Use the specific additional information boxes to add a note relating to a particular value, as shown.

This text will appear on your report directly below the value.

Current market value of the property	£ 185,000.00 Awaiting a further valuation

(On the ***Financial Summary*** page, where there isn't much room, post-it notes next to each subtotal show you where these Additional information boxes are.)

Use the ***Additional information*** boxes at the end of a section to enter more general information – for example a comment relating to all the children in the children section.

The heading 'Additional information' will only appear on the printed form if you have entered any information in that box.

Income needs

Form E

Using the templates provided

The best and most efficient way to handle the income needs section in Form E is to use the templates provided.

It will help you enormously when you come to enter income needs if the Form E you have sent your client included the same template. See the section ***Blank forms*** in ***Saving and printing*** later in this manual for more information on this.

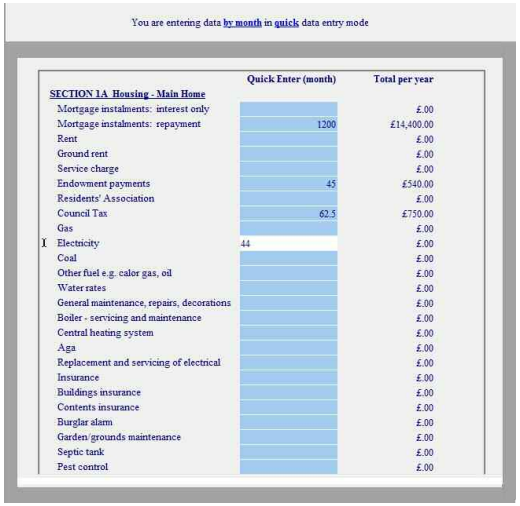
Note: You do not have to start with a template; you can choose to enter each item individually by adding an entry each time. But this will take you a lot longer and is not recommended for income needs unless you have a short list!

Quick data entry

Assuming you haven't changed the setting in ***Preferences*** so the template is not included (see the section ***Inserting income needs template*** in ***Saving and printing*** later in this manual), when you click on section 3.1.1, ***Your income needs***, the income needs template will be showing.

It will say at the top of the screen 'You are entering data by month in quick data entry mode'. As its name suggests, this is the quickest way to enter data, when all you need to enter is a figure.

In this mode, you only enter one set of figures – the future costs, which are those used in the calculations. The same figure will be inserted into the ***Current costs*** column (although you can change this by clicking on ***quick***, then unchecking the ***Current and future costs equal*** box. The ***Current costs*** column will then be left blank.)


You are entering data by month in quick data entry mode

	Quick Enter (month)	Total per year
SECTION 1A Housing - Main Home		
Mortgage instalments: interest only		£.00
Mortgage instalments: repayment	1200	£14,400.00
Rent		£.00
Ground rent		£.00
Service charge		£.00
Endowment payments	45	£540.00
Residents' Association		£.00
Council Tax	62.5	£750.00
Gas		£.00
Electricity	44	£.00
Coal		£.00
Other fuel e.g. calor gas, oil		£.00
Water rates		£.00
General maintenance, repairs, decorations		£.00
Boiler - servicing and maintenance		£.00
Central heating system		£.00
Aga		£.00
Replacement and servicing of electrical		£.00
Insurance		£.00
Buildings insurance		£.00
Contents insurance		£.00
Burglar alarm		£.00
Garden/grounds maintenance		£.00
Septic tank		£.00
Pest control		£.00

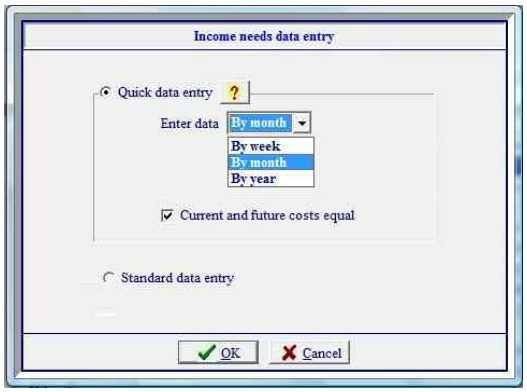
Then simply work down through the rows, entering the figures your client has provided by month into the ***Quick enter by month*** column. Make sure you press ***Return*** on your keyboard to move from one row to another, and don't click with your mouse.

Check the ***Maximise list*** box in the bottom right to see more rows on your screen.

Ignore any rows your client has left blank.

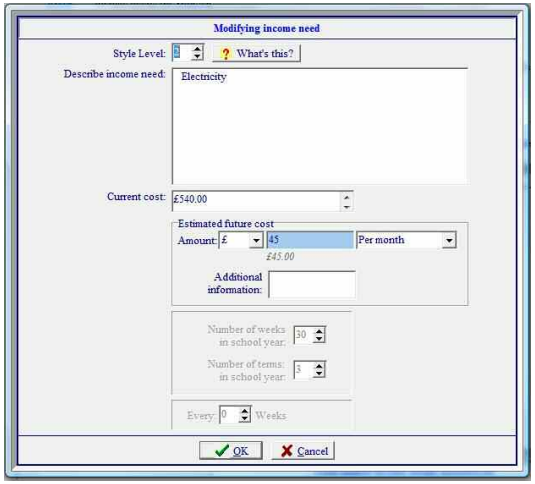
If your client has provided some income needs as annual figures, click on the blue ***by month*** at the top and in the box that appears

select ***by year***. Then work through the rows again adding any annual figures. (Repeat the process for any weekly figures.)



If you need to change an item's description, or enter a different figure for the current and future cost of an item, highlight the row, then click ***Modify***. Make your changes and click ***OK***.

Use the ***Add*** button to add any items your client has listed that weren't on the template.

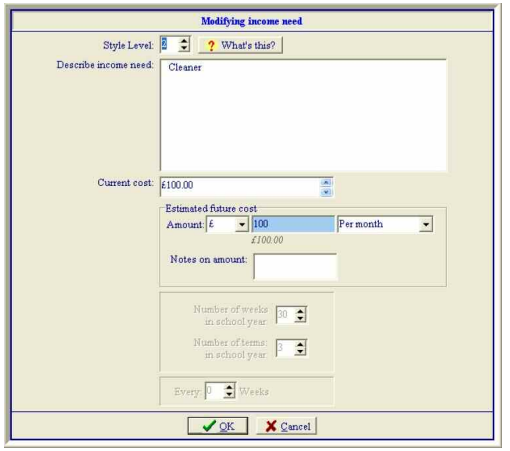


When you have finished entering all your client's income needs, click ***Delete*** and you'll be able to delete all the empty rows at once. Select to delete all items of zero value – i.e. the rows you have left blank – and they'll all be removed.

Select a period in the ***Calculate total*** drop down list box on the right hand side. This governs how the income needs will be calculated and displayed on your printed form.

Standard data entry mode

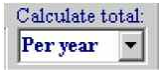
To change to standard mode click on quick and select the standard entry mode radio button.



In this mode, you cannot enter directly into the screen.

Select ***Modify*** to enter information on an existing item, and ***Add*** to create a new entry (see above).

The ***Calculate total*** box below still governs how the total will be displayed and printed on the form – i.e. by week, month or year.



Style and heading levels – an example

For example, the section heading 'Property costs and garden' is a 'Style level 1'. If **QUANTUM** finds items beneath it with a higher style level (i.e. level 2) then it will assume that 'Property costs and garden' is a heading. It will then assign the level 1 heading attributes (bold and underline). You can see what the style levels are by clicking on MODIFY. Essentially, *ClientNoChildren.nds* consists of only two style headings: 1 and 2.

Let's say you wish to expand the 'Telephone costs' and wish to create several sub-categories as follows:

Property costs and garden
  Telephone
    Land line
    Mobile

1. Click on 'Telephone – land line' to select it.
2. Click on MODIFY
3. Change the text to 'Telephone' and click on OK
4. Click on ADD
   (a) Change the style heading to '3'
   (b) Enter the description 'Land line'
   (c) Enter 50 in the blue amount box
   (d) Change the period to 'Per quarter'
   (e) Click on OK
5. Note how 'Telephone' becomes underlined and 'Landline' falls beneath it.
6. Click on ADD
   (a) Ensure the style heading is '3'.
   (b) Enter the description 'Mobile'
   (c) Enter 30 in the blue amount box.
   (d) Change the period to 'Per month'
   (e) Click on OK

Forms E1 and E2

Unlike Form E, in both Forms E1 and E2 there is a given list of expenses on the prescribed Court form.

The default in **QUANTUM** is for you to enter data in Forms E1 and E2 using these lists.

Select the period (weekly or monthly) for which you want to enter data – this is also how the expenses will appear on the report.

Select an item and then click ***Modify*** to add an amount.

You can add new expenses here in two prescribed categories – 'Insurance – other' and 'Others'. When you click ***Add***, select the category into which you want the expense placed, and then enter a description and amount.

If you don't want to follow the prescribed form layout, and would rather use the Form E income needs template, go to ***Preferences/Income/capital needs/Forms E1 and E2*** and change the selection there. See the sections above this on how to work with the template.

Using your own templates

If you want to use your firm's own income needs template, rather than the one in **QUANTUM**, we can incorporate it into the program for you, where it will work exactly as described here.

Contact the helpline on 01652 652 222.

Other features within Form E

Voluntary disclosure version

Tick the box on the cover sheet if you want a Form E for voluntary disclosure. The cover sheet (and various references to the Court process later in the form) will then be amended accordingly.

Financial statement

- For a financial order under the Matrimonial Causes Act 1973/Civil Partnership Act 2004
- For financial relief after an overseas divorce etc under Part 3 of the Matrimonial and Family Proceedings Act 1984/Schedule 7 to the Civil Partnership Act 2004

of

Jayne Marie Hillier

Voluntary Disclosure

☐ Husband ☑ Wife ☐ Civil partner

The parties are

Jayne Marie Hillier and David Iain Hillier

Who is the wife Who is the husband

You can uncheck this box at any time – you won't lose any data.

Child support maintenance calculators

Section 1.13 of Form E (Child support calculation) asks for an estimate of the paying parent's liability if maintenance has not yet been set.

You can calculate child maintenance under either the 2000 or 2008 régime, and both deal with shared care. (There a link to help you if you are unsure as to which régime to calculate under.)

Answer the questions that appear and then click ***Insert child support***. The calculation is performed and standard text (which you can amend) is then dropped into the report for you.

The calculators can also be found in the child support sections of D8A and also under ***Tools***.

Importing pension data from Form P (and PPF)

If you've already created a Form P (or Form PPF) then you can import the relevant details of this pension into Form E, to save you re-entering it.

Select from the drop-down list where you want to pull the information in from and then click ***Import***. You'll see that a pension record is automatically created in Form E, and the relevant data copied across.

Income from benefits

Child benefit

When you add a child in ***Data common to several forms/Child details*** you will be asked 'Does your client receive child benefit for this child?'

If you answer yes, the appropriate amount of child benefit will be

added automatically to **section 2.18, State Benefits** in Form E (or to the appropriate income section in Form E1 or E2).

Note: the full amount of child benefit is always inserted; if your client then pays some of it back in tax you must remember to enter that deduction.

For information on how to update and maintain these rates (and to switch off the auto-insert) see the section on ***Preferences/ Timesavers/Child benefit***.

State pension

When you enter your client's details, you will be asked if they receive a state pension.

If you answer yes, the appropriate amount will be added automatically to **section 2.18, State Benefits** in Form E (or to the appropriate sections in Form E1 or E2).

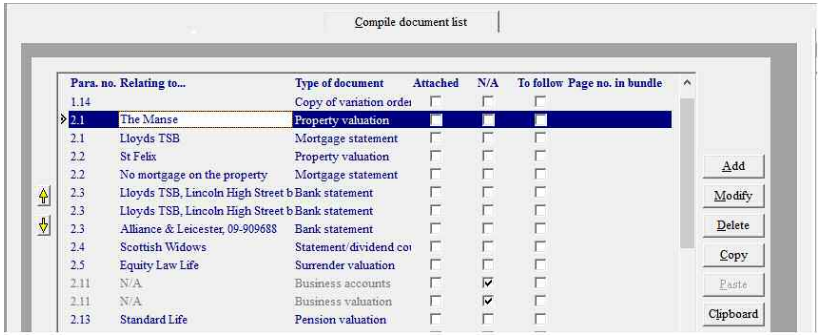
For information on how to update and maintain these rates (and to switch off the auto-insert) see the section on ***Preferences/ Timesavers/State pension***.

Schedule of documents

Complete this page when you are ready to file your Form E (or Form E1 or E2). Click on 'Compile document list' and the prescribed list of entries will be pulled in, with the sections where you have completed in Form E in blue. Where you have left sections blank, the entries are in grey and the 'N/A' column ticked already (you can change this). If you want to fill in the column 'Page no. in bundle' click on ***Modify*** and do it there.

Select whether the relevant document will be attached to the form or will follow.

You can add, delete and modify entries using the buttons on the right.


Compile document list
Para. no. Relating to... Type of document Attached N/A To follow Page no. in bundle
1.14 Copy of variation orde
2.1 The Manse Property valuation
2.1 Lloyds TSB Mortgage statement
2.2 St Felix Property valuation
2.2 No mortgage on the property Mortgage statement
2.3 Lloyds TSB, Lincoln High Street b Bank statement
2.3 Lloyds TSB, Lincoln High Street b Bank statement
2.3 Alliance & Leicester, 09-909688 Bank statement
2.4 Scottish Widows Statement/dividend co
2.5 Equity Law Life Surrender valuation
2.11 N/A Business accounts
2.11 N/A Business valuation
2.13 Standard Life Pension valuation
Add
Modify
Delete
Copy
Paste
Clipboard

Back page

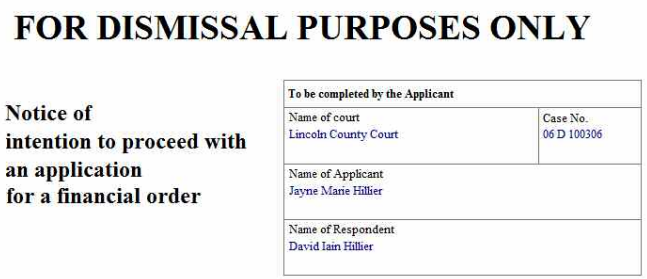
Information you have entered in ***Basic case information*** and your firm's details will be automatically transferred here, to create a back page for your Form E (or Form E1 or E2).

Case no. 06 D 100306
In the Lincoln County Court
In the marriage between
Jayne Marie Hillier
who is the Applicant
and
David Iain Hillier
who is the Respondent
Financial Statement on behalf of
Jayne Marie Hillier
who is the wife
Petitioner in the divorce
Applicant in this matter
This statement is filed by
ABC Law
ABC House
50 High Street Lincoln
who are solicitors for the wife

Other features within the expandable forms

Form A

If you want a Form A for dismissal purposes only, just tick the box at the top of the screen, and that wording will appear.



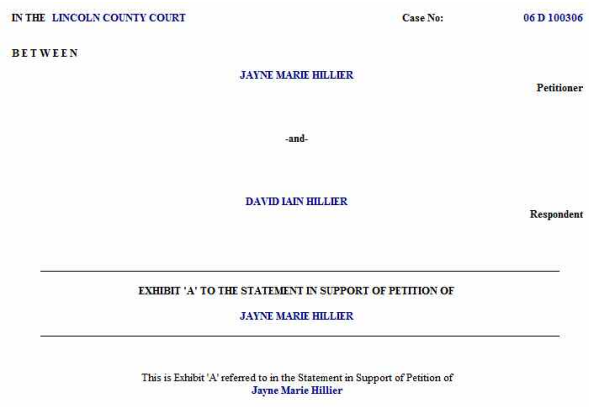
FOR DISMISSAL PURPOSES ONLY

Notice of intention to proceed with an application for a financial order

To be completed by the Applicant	
Name of court Lincoln County Court	Case No. 06 D 100306
Name of Applicant Jayne Marie Hillier	
Name of Respondent David Iain Hillier	

Form D8o

If you want to print an 'Exhibit A' sheet to attach to your Form D80 (Statement in support of petition) go to the final tab in whichever version of D80 you are using and tick the box there. It will then print out as the last page of the form.



IN THE LINCOLN COUNTY COURT Case No: 06 D 100306

BETWEEN

JAYNE MARIE HILLIER

Petitioner

-and-

DAVID IAIN HILLIER

Respondent

EXHIBIT 'A' TO THE STATEMENT IN SUPPORT OF PETITION OF

JAYNE MARIE HILLIER

This is Exhibit 'A' referred to in the Statement in Support of Petition of
Jayne Marie Hillier

Form H (Estimate of Costs)

You can create and save more than one Form H here.

Click ***Add*** to create each one.

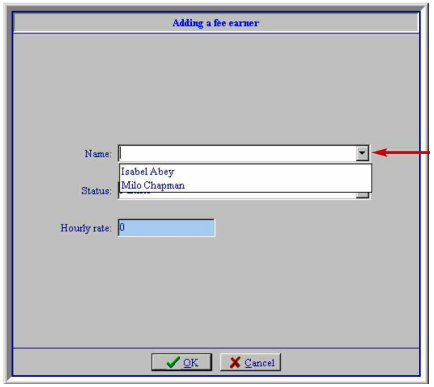
Note that although you come to the 'Summary' section last as you enter data (so that the totals can be calculated before you complete it), it will print out in the 'correct' place at the top of the form!

If you have to complete more than one Form H, click on ***Add*** again and follow the same procedure.

Form H1 (Statement of Costs)

Click ***Add*** to create a form (you can create as many as you need for each case).

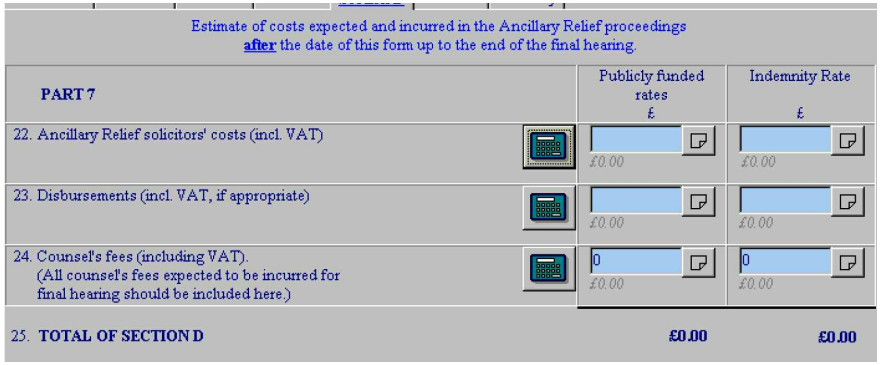
You can add fee-earners directly here, by just filling in the relevant boxes. Or, if you have names already entered into the fee-earner database (see ***Your firm's details and fee-earners***) you can select them from a drop-down list:



Click here to see a list of fee-earners you have entered in the database. Choose the name you want.

The fee-earner's status and rate will then be automatically inserted. (If you have both an indemnity and a publicly funded rate entered, you will be asked which you wish to appear at the top of the form.)

In Section D (where you are asked to estimate future costs) we have provided you with appropriate calculators. For example, for solicitors' costs, you can select from fee-earners already entered, enter their future expected hours, and the total cost will be calculated.


Estimate of costs expected and incurred in the Ancillary Relief proceedings
after the date of this form up to the end of the final hearing.
PART 7
Publicly funded rates £
Indemnity Rate £
22. Ancillary Relief solicitors' costs (incl. VAT)
£0.00
£0.00
23. Disbursements (incl. VAT, if appropriate)
£0.00
£0.00
24. Counsel's fees (including VAT).
(All counsel's fees expected to be incurred for final hearing should be included here.)
0
£0.00
0
£0.00
25. TOTAL OF SECTION D
£0.00
£0.00

Similar breakdowns are supplied for the other two questions. In all cases, VAT is added (if appropriate) as a default, but this can be de-selected.

Note that although you come to the 'Summary' section of the form last as you enter data (so that the totals can be calculated before you complete it), it **will** print out in the 'correct' place at the top of the form!

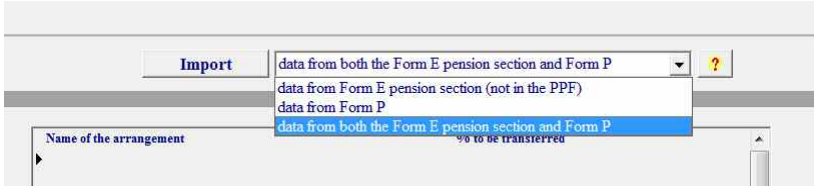
If you have to complete more than one Form H1, click on ***Add*** again and follow the same procedure.

Pension Forms

You can create and save more than one of each type of pension form here – i.e. one for each pension. Select the form you wish to fill in, and click ***Add*** to create each one. (Though you can only create one BR19 and BR20, as there is only one state pension.)

Throughout the pension forms you'll see that you can import relevant details of pensions already entered elsewhere, to save you having to type it in again. For example, if you're creating a Form P1, you can pull in a pension entered in Form P or Form E.

Select from the drop-down list where you want to pull the information in from and then click ***Import***. You'll see that a form is automatically created for that pension, and the relevant data copied across.

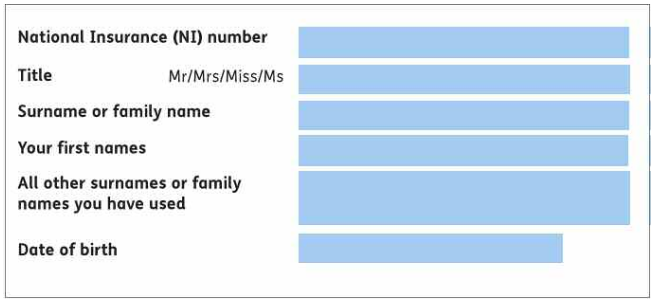

Import
data from both the Form E pension section and Form P
data from Form E pension section (not in the PPF)
data from Form P
data from both the Form E pension section and Form P
Name of the arrangement
% to be transferred

Non-expandable forms

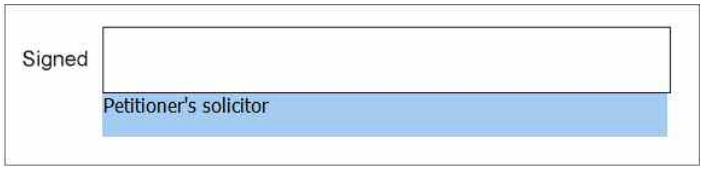
Some forms have been developed as non-expandable PDF-style forms as they don't need **QUANTUM**'s ability to expand and intelligent handling of calculations.

Blue text boxes

You enter data directly into the **blue text boxes** in the form. The boxes do not expand and the data will not be checked or validated (i.e. you can enter anything you like in a date box).



In some cases we have inserted what we consider the most likely text into a blue text box – for example that D36 is signed by the 'Petitioner's solicitor' rather than the 'Petitioner'. You can edit this text as you need to.



Auto-fill of relevant data

QUANTUM will auto-fill any relevant data from ***Basic case information*** the first time you enter the form.

Import relevant Basic Case Information
Notice of application for decree nisi to be made absolute or conditional order to be made final
To be completed by the Petitioner or Respondent
Name of court
Lincoln County Court
Case No.
06 D 100306
Name of Petitioner
Jayne Marie Hillier
Name of Respondent
David Iain Hillier
Name of Co-Respondent (if applicable)
Insert from D8

If you change any of this data it will not be changed in ***Basic case information***. If you ever wish to re-insert this data click on the **yellow button** ***Import relevant Basic case information***.

Note that **QUANTUM** will pick up from ***Basic case information*** whether your client is the Applicant/Respondent or Petitioner/Respondent and fill the form in accordingly. (You can change this within the form if you need to.)

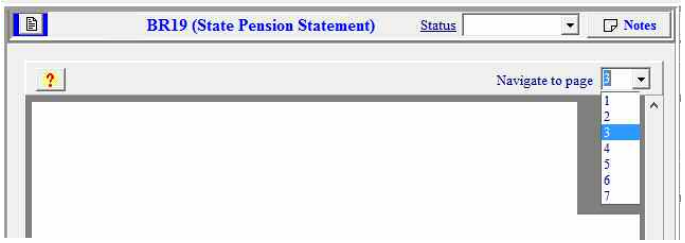
The exceptions to this are the children forms, where **QUANTUM** will ask you if your client is the Applicant or Respondent.

Orange buttons

Orange buttons insert relevant data already entered in places other than in ***Basic case information*** – for example your firm's details. This data is not dropped in automatically, but only when you choose to do so by clicking on the orange button.

Moving around the form

Move from page to page using the scroll bar or changing the page in the drop down list box at the top of the screen.



Tools

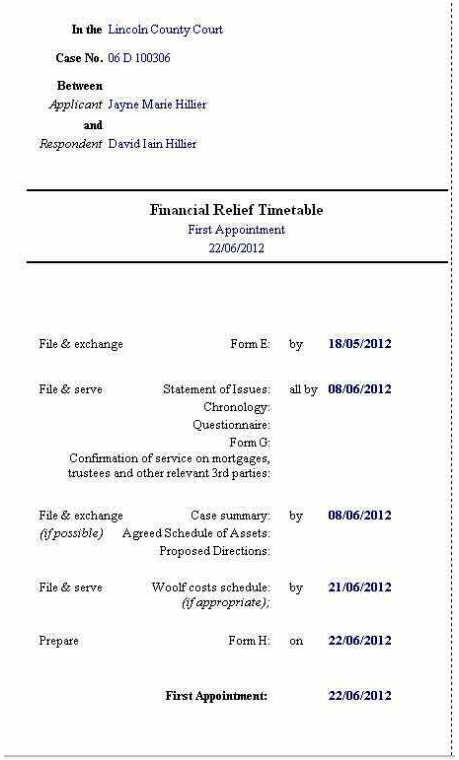
Financial Remedy Timetabler

Page Break
Financial Remedy Timetabler
Notes
Appointment: First Appointment
Date of First Appointment: 22/06/2012
File & exchange Form E: by Friday 18/05/2012
File & serve Statement of Issues: all by Friday 08/06/2012
Chronology:
Questionnaire:
Form G:
Confirmation of service on mortgagees, trustees and other relevant 3rd parties:
File & exchange (if possible) Case summary: by Friday 08/06/2012
Agreed Schedule of Assets:
Proposed Directions:
File & serve Woolf costs schedule: all by Thursday 21/06/201
(if appropriate)
Prepare Form H: on Friday 22/06/2012
First Appointment: Friday 22/06/2012

Select the type of appointment and its date (you will be warned if you have entered a Saturday or Sunday).

The date and nature of each pre-appointment compulsory stage is shown.

You can then print this out and use it for your client file (see overleaf).


In the Lincoln County Court

Case No. 06 D 100306

Between

Applicant Jayne Marie Hillier

and

Respondent David Iain Hillier

Financial Relief Timetable

First Appointment

22/06/2012

File & exchange	Form E:	by	**18/05/2012**
File & serve	Statement of Issues:	all by	**08/06/2012**
	Chronology:		
	Questionnaire:		
	Form G:		
	Confirmation of service on mortgages, trustees and other relevant 3rd parties:		
File & exchange *(if possible)*	Case summary:	by	**08/06/2012**
	Agreed Schedule of Assets:		
	Proposed Directions:		
File & serve	Woolf costs schedule: *(if appropriate);*	by	**21/06/2012**
Prepare	Form H:	on	**22/06/2012**
	First Appointment:		**22/06/2012**

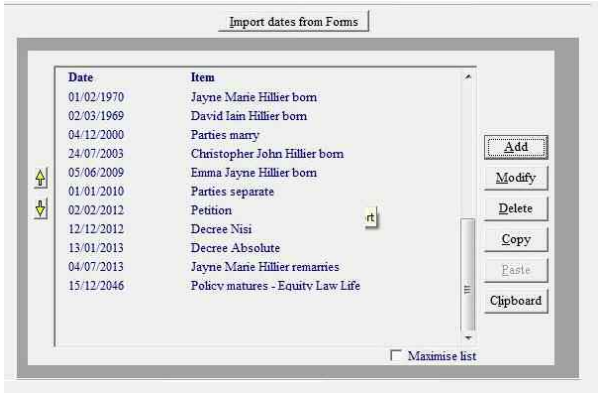
Chronology

QUANTUM assumes that the Chronology will be created once your client's Form E (or Form E1 or E2) has been completed.

Click on the button ***Import dates from forms*** and a list of items will be dropped in.

Use the arrows to move items around while you are compiling your list, but don't worry about sorting it, as this will be done automatically when you print the chronology.

Add additional items by clicking on ***Add***; use ***Modify*** to edit existing entries.



Yellow buttons move your entries up or down

Sort date and display date

An item's **sort date** determines where in the Chronology it is placed. This date will be printed in the Chronology unless you change it in the **display date** field.

Sometimes you may not want to put in an exact date but, for example, a month or range of dates. Enter this in the **display date** field. However, to work out where to place the item in the Chronology, **QUANTUM** needs an exact date – and so you must also enter a **Sort Date** for the item. For example, and as shown in the picture, for the entry showing when the couple separated:

Display date	**Possible sort date to enter**
October 2011	01/10/2011

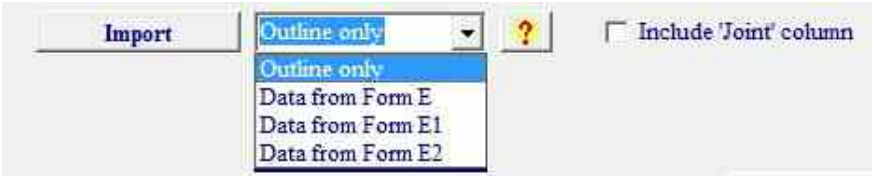
Export to Word or Excel

Either complete the Chronology using **QUANTUM** or use the ***Clipboard*** facility to export the items to Word or Excel. Then paste the data into your document or workbook there.

Schedule of Assets

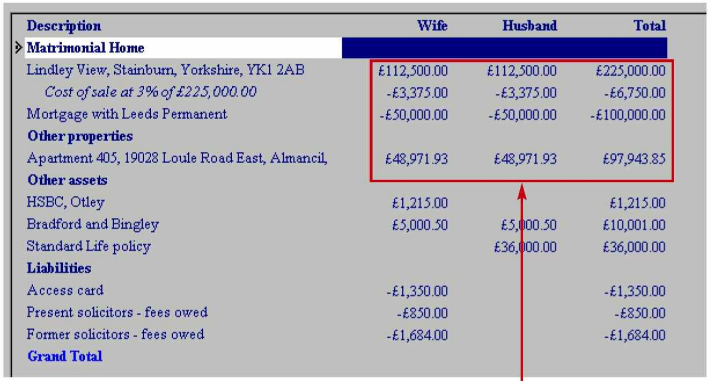
NOTE: **QUANTUM** assumes that the Schedule of Assets will be created once your client's Form E (or Form E1 or E2) has been completed. This means that any information you amend in the Schedule of Assets will not be similarly amended in the form – you will have to go back and alter the information in the form yourself.

Choose which form you want to pull data in from and click on the button ***Import*** to insert information. 'Outline' will pull in only the item descriptions, but no figures.



You will now see all the assets entered in your client's Form E listed in the Schedule of Assets. Assets you have specified as jointly owned will have 50% of the value in the wife and husband's column. Note that you can decide whether to include a 'Joint' column or not.

The program also puts in some text to be printed at the top of your report – date of marriage and separation and the ages of children. Delete, amend or add to this as you wish.



Description	Wife	Husband	Total
Matrimonial Home			
Lindley View, Stainburn, Yorkshire, YK1 2AB	£112,500.00	£112,500.00	£225,000.00
Cost of sale at 3% of £225,000.00	-£3,375.00	-£3,375.00	-£6,750.00
Mortgage with Leeds Permanent	-£50,000.00	-£50,000.00	-£100,000.00
Other properties			
Apartment 405, 19028 Loule Road East, Almancil,	£48,971.93	£48,971.93	£97,943.85
Other assets			
HSBC, Otley	£1,215.00		£1,215.00
Bradford and Bingley	£5,000.50	£5,000.50	£10,001.00
Standard Life policy		£36,000.00	£36,000.00
Liabilities			
Access card	-£1,350.00		-£1,350.00
Present solicitors - fees owed	-£850.00		-£850.00
Former solicitors - fees owed	-£1,684.00		-£1,684.00
Grand Total			

For all properties (matrimonial and others) **QUANTUM** *assumes that the balance of the asset is held by the other side*

Properties

For all properties (matrimonial and others) Quantum assumes that the balance of the asset is held by the other side. For example, if your client wife has a 50% interest in the matrimonial home, the remaining 50% will be assigned to the husband. This assigning of the remaining percentage to the other side occurs only on properties.

Adding and modifying entries

Remember that the only data entered here when you import it is your client's – apart from the residual interest in the properties.

So you will want to add and modify some entries when you have seen the other side's Form E.

Modifying entries

To modify (edit) an entry, highlight it and click ***Modify***.

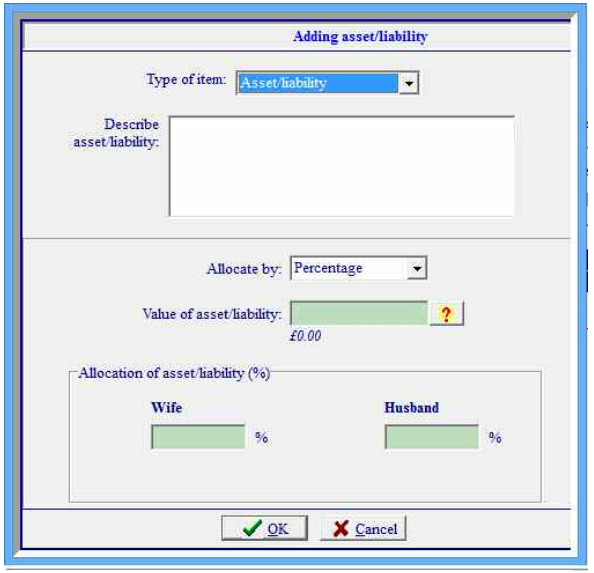
Change the percentage share and/or value of the asset.

Adding entries

To add a new entry, decide where in the list you want to place the entry, highlight the entry above and click ***Add***.

Describe it, enter the value and then allocate an amount or percentage to either or both sides.

To add a new heading for a group of assets, click Add then change the type of item to heading and enter a description. Click ***OK***.



Grand total

QUANTUM automatically places the Grand Total for the Schedule of Assets before income and pensions. You can move it up or down the report by using the yellow arrow keys on the left.

You can also add further Grand Totals by clicking on that button.

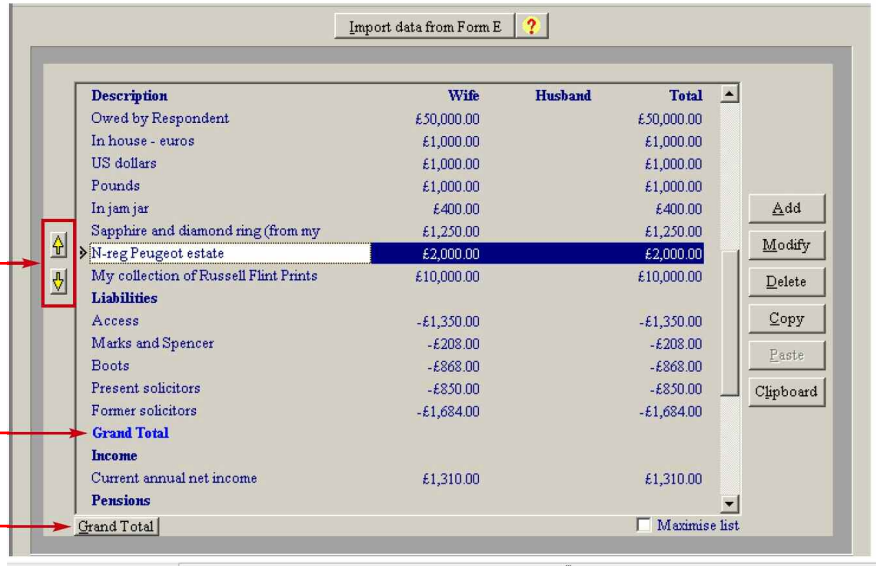
Don't worry when the Grand Total doesn't appear on screen – it will on the printed report!

(When the Schedule of Assets is printed, all the items above a Grand Total line will be added together and a value and percentage allocated to husband and wife.)

You can also add further **Grand Totals** *by clicking on this button*

Quantum *automatically adds a* **Grand Total** *before income and pensions*

Highlight the **Grand Total** *line and use these arrow keys to move it up and down*



Clipboard – working on the Schedule of Assets in Excel

Once the basic data is pulled into the Schedule of Assets tool and formatted, some users might prefer to then export it to Excel to work further on the data there.

Use the Clipboard facility to copy the items onto your clipboard, and then select Paste when in Excel (or any other program) to drop the data into your workbook/document.

When you copy data to the clipboard you will be asked if you want to include the underlying formulae or not. It may be helpful to have them if you will be working on the schedule in Excel.

Orders

At the bottom of the Navigator you will see a section called ***Orders***. This is where you can create orders, following the new standard order templates, personalized to your case.

There are two sub-sections under ***Orders – Create an order*** and ***View merged orders***.

Create an order

This is what you see when you click on ***Create an order***:

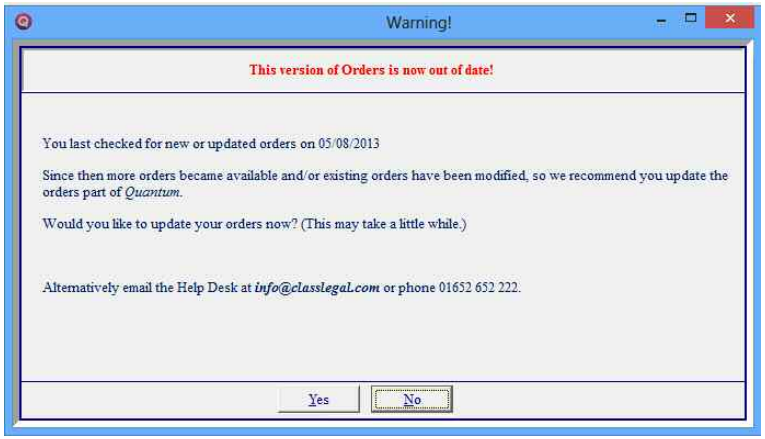
Click here to check whether new orders are available
Type of order: Children Orders (Private Law)
Order:
Our client is the Applicant in this Order
Create a merged order

Checking if new orders are available

Because new template orders will be released on an ongoing basis, when the President of the Family Division approves them, we have decided to store the orders on our website (so you don't have to update a new version of **QUANTUM** each time a new order is available).

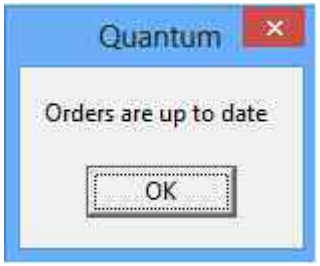
Each time you go into the ***Orders*** section it is worth clicking on 'Click here to check whether new orders are available'.

If they are, you'll then see a screen like this:


Warning!
This version of Orders is now out of date!
You last checked for new or updated orders on 05/08/2013
Since then more orders became available and/or existing orders have been modified, so we recommend you update the orders part of Quantum.
Would you like to update your orders now? (This may take a little while.)
Alternatively email the Help Desk at info@classlegal.com or phone 01652 652 222.
Yes
No

Follow the instructions and your list of template orders will be automatically updated,

If there aren't any new orders, you'll see this message:



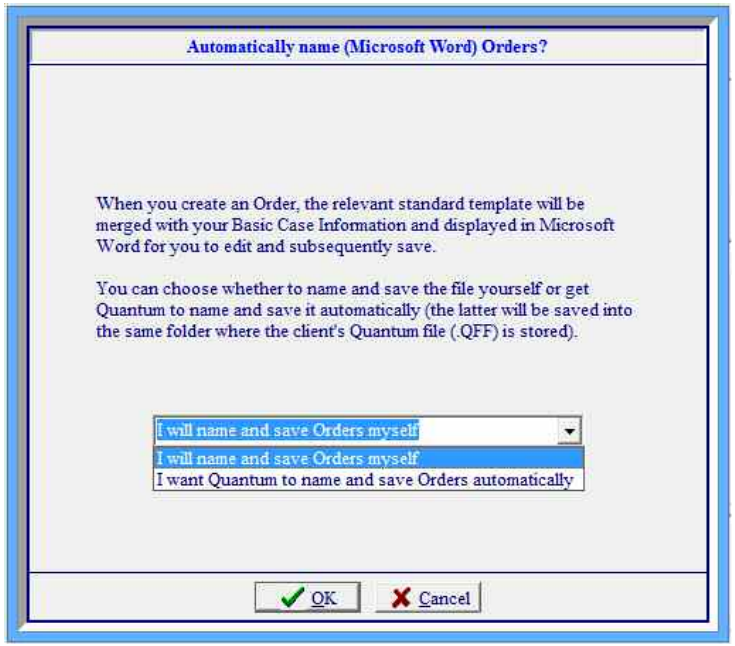
Creating your order

Use the drop down list boxes to decide on the order you wish to create.

Click on the ***Create a merged order*** button.

By default, **QUANTUM** will create an unnamed Word document which you then name and save (to your chosen folder).

If you want, **QUANTUM** can name and save the document for you automatically. It will save the file into the same folder where the QFF case you have open is stored. To turn this option on, go to ***Preference/Auto name (Word) orders*** and select the second option.


Automatically name (Microsoft Word) Orders?
When you create an Order, the relevant standard template will be merged with your Basic Case Information and displayed in Microsoft Word for you to edit and subsequently save.
You can choose whether to name and save the file yourself or get Quantum to name and save it automatically (the latter will be saved into the same folder where the client's Quantum file (.QFF) is stored).
I will name and save Orders myself
I will name and save Orders myself
I want Quantum to name and save Orders automatically
OK
Cancel

In either event, your order will open in Word.

Search Order

In the Lincoln County Court **No: 06 D 100306**

The Matrimonial Causes Act 1973

The Civil Partnership Act 2004

The Matrimonial and Family Proceedings Act 1984

The Senior Courts Act 1981

(delete as appropriate)

The marriage of JAYNE MARIE HILLIER and DAVID IAIN HILLIER

After hearing *[name the advocates(s) who appeared]*....
After reading the statements and hearing the witnesses specified in the recitals below

Looking at the document you'll see that whatever data **QUANTUM** can merge into the order, it will have done (you'll see that in blue: in the example above, the Court name, case number and parties' names).

Anything left for you to fill in or decide how to deal with will be in red (or blue if merge data was missing from your ***Basic case information***).

Amend the order in Word, and save it as normal.

View merged orders

Click on View merged orders to see all orders that have been created for this case.

These are shown within the ***Case dashboard*** – see that section later in the manual for further information.

Double click on any of the orders shown to open it.

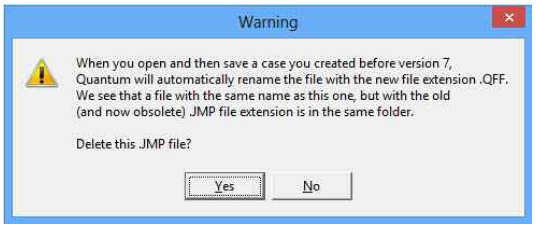
(Note that if you have changed the file name and removed the case code then it won't be listed here – see the section on the ***Case dashboard*** for more details.)

Saving and printing

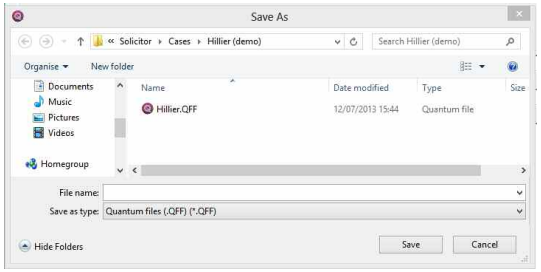
Saving

Files

QUANTUM file extensions changed from .JMP to .QFF in Version 7.0. You will still be able to open a JMP file but can only save a QFF file. If, for example, you opened Smith.JMP and saved it to Smith.QFF, you will be asked if you wish to delete the original Smith.JMP version (to avoid having two versions of the same file):


Warning
When you open and then save a case you created before version 7, Quantum will automatically rename the file with the new file extension .QFF. We see that a file with the same name as this one, but with the old (and now obsolete) .JMP file extension is in the same folder.
Delete this .JMP file?
Yes
No

We strongly recommend that you save your case frequently using ***File***, ***Save as*** … or ***File, Save***, as appropriate.



Reports

You can save an individual form or report as either a ***pdf*** (Acrobat) or ***rtf*** (basic common word-processing format) file. This means you can then email the file to your client for them to open on their computer.

Click ***File/Save report*** and choose the format.

***** Please see the section on the Case dashboard for further help with this *****

Emailing

As discussed above, if you save your form or report as either a pdf or rtf file you can then email it to your client for them to open on their computer.

(Your client will be able to look at and print the pdf file only – not change it in any way! They will be able to make changes to the rtf file.)

Select ***File, Save Report*** and choose ***pdf*** or ***rtf***. Select the form or tool to save and click ***OK***.

Choose the name and location where you wish to save the file.

Then create an email in your usual way and attach the rtf or pdf file you have just created.

***** Please see the section on the Case dashboard for further help with this *****

Page breaks

On most data entry screens you can tick to insert a page break before that section.

Blank forms

Don't produce a blank form by simply printing an empty case, as **QUANTUM** shrinks empty boxes and prints zeros in all the totals.

Instead, select ***File/Blank forms/Print***, then choose the form(s) you want to print. These forms have been specially formatted.

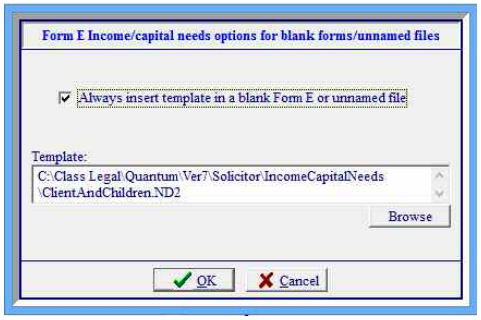
If you want to email to the blank form to your client, click ***File/Blank forms/Save as***, select the form and then save it as a pdf (Adobe Acrobat) or rtf (basic wordprocessing) file. Save the file into a directory, and then attach it to your email when you send it.

Inserting income needs template

QUANTUM is set to put an income needs template into a blank or unnamed Form E.

This means that when you send or email your client a copy of the blank Form E to fill in, you will no longer have to attach a separate income needs schedule. It will make it much easier for you to subsequently enter the income needs (see the ***Income needs*** section earlier in this manual for further information).

To change this setting, or to choose a different template, go to ***Preferences/Income/capital needs*** options and check the box 'Always insert template in a blank form E or unnamed file'.



Printing

When you want to print a form or forms, click on ***File*** then ***Print***.

Note that you have the choice of adding a watermark – i.e. 'Draft' or 'For dismissal purposes only' – on your form.

Select the form or form you wish to print and click OK. If you are printing Form E you can decide if you want to print all or part of the form.

On the Print Preview screen that then appears, click on the printer icon in the top left to print.

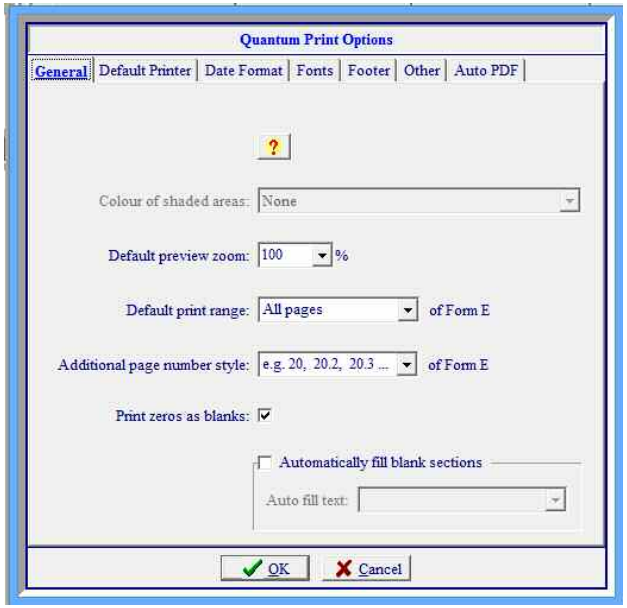
Print preview

At the top left-hand corner of most data entry screens, you will see this icon:

Click on this icon to 'print preview' the whole of that page. (If you the data extends over more than one page, there will be two (or more) pages to view.)

Print options

Various options governing the way your printed forms look are gathered here. Look through them all, and click on the button shown below for detailed information on the options and to see if you want to change any of the standard settings.



One of the most important options is the font you want your forms to be printed in. You can specify a font both for the data you enter and for the wording of the official forms.

You can also create your own customised footer for the forms here, including deciding whether to date the forms at the bottom or not.

Case dashboard

The ***Case dashboard*** has been designed to help you keep track of the forms and files you create for each case.

A brief run through

Probably the best way to familiarise yourself with the ***Case dashboard*** is to look at the demo case we have created.

Go to ***File/Open*** and find the case `Hillier.QFF` in the following folder:

`C:\Class Legal\Quantum\Ver7Beta\Solicitor\Cases\Hillier` (demo)

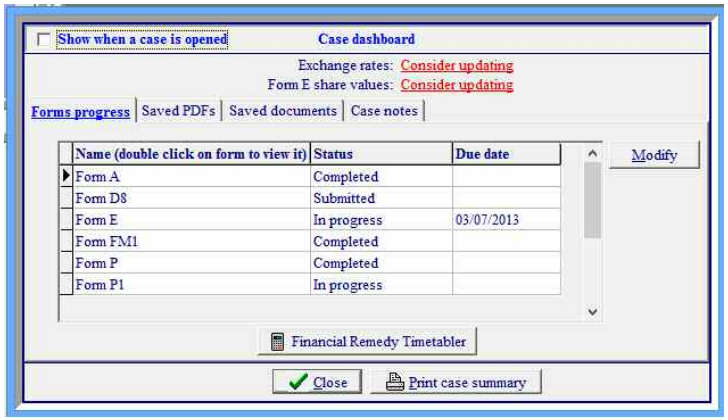
Tick on the blue button ***Case dashboard*** at the top of the Navigator.

You'll see that the tickbox on the top left isn't checked – tick it if you do want the ***Case dashboard*** won't appear automatically each time a case is opened (though people can change that setting themselves if they decide they do want it to appear each time).

Forms progress

Have a look at the ***Forms Progress*** tab and you will see that there are already several forms in this demo case, set as either ***In progress*** or ***Completed***. (See later on in this section for how to set the status of a form.)

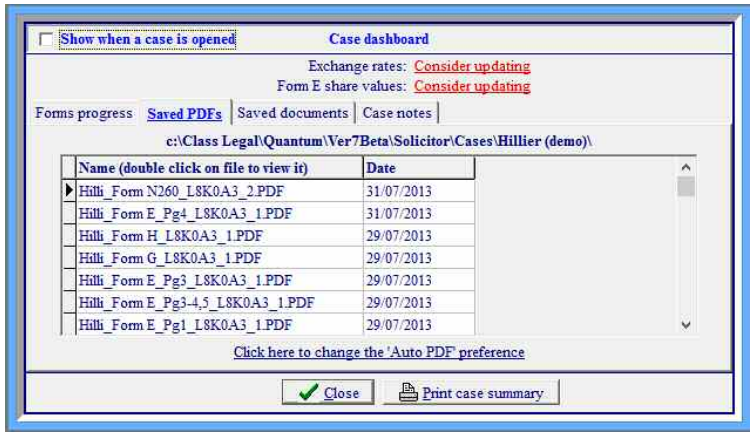
Double click on any form in the ***Forms progress*** tab and the relevant form will be opened (we hope this will save you time as we put more and more forms into **QUANTUM**!)


Show when a case is opened
Case dashboard
Exchange rates: Consider updating
Form E share values: Consider updating
Forms progress | Saved PDFs | Saved documents | Case notes
Name (double click on form to view it) | Status | Due date
Form A | Completed
Form D8 | Submitted
Form E | In progress | 03/07/2013
Form FM1 | Completed
Form P | Completed
Form P1 | In progress
Modify
Financial Remedy Timetabler
Close
Print case summary

Add or edit a due date for each form by clicking on the 'Modify' button. (Note there is a link to the ***Financial Remedy Timetabler*** on this screen, so you can work out, from a hearing date, when certain forms are due).

Saved PDFs

Go to the ***Saved PDFs*** tab – you'll find a list of the forms for this case that have been saved to PDF. (See ***Creating PDFs*** automatically later in this section for more detailed information on this.)


Show when a case is opened
Case dashboard
Exchange rates: Consider updating
Form E share values: Consider updating
Forms progress | Saved PDFs | Saved documents | Case notes
c:\Class Legal\Quantum\Ver7Beta\Solicitor\Cases\Hillier (demo)\
Name (double click on file to view it) | Date
Hilli_Form N260_L8K0A3_2.PDF | 31/07/2013
Hilli_Form E_Pg4_L8K0A3_1.PDF | 31/07/2013
Hilli_Form H_L8K0A3_1.PDF | 29/07/2013
Hilli_Form G_L8K0A3_1.PDF | 29/07/2013
Hilli_Form E_Pg3_L8K0A3_1.PDF | 29/07/2013
Hilli_Form E_Pg3-4,5_L8K0A3_1.PDF | 29/07/2013
Hilli_Form E_Pg1_L8K0A3_1.PDF | 29/07/2013
Click here to change the 'Auto PDF' preference
Close
Print case summary

Note the L8K0A3 part of the filename. This is the 'key' which links all the PDF files to this demo case, Hillier.QFF. (See the section on ***Case code*** later in this section for more information.)

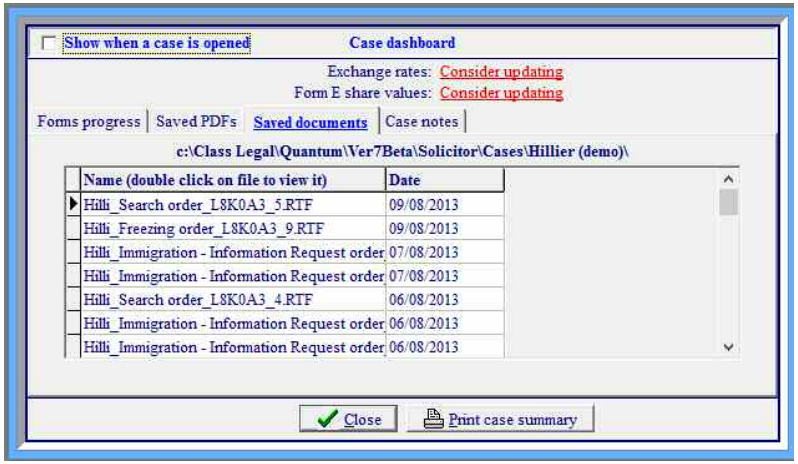
Double click on the PDF file and it will open in Acrobat Reader.

You can decide how to sort the PDF files by clicking on the column heading – i.e. to sort them by descending date order click on the date heading. **QUANTUM** will remember your settings and view the files according to your last choice.

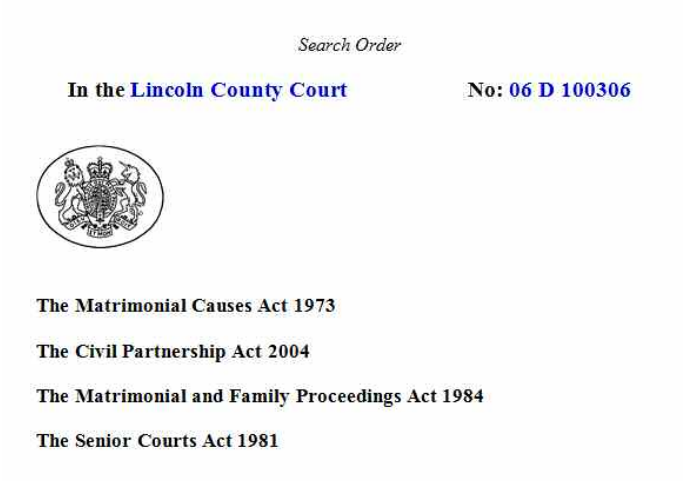
Name (double click on file to view it)	Date
Hilli_Form N260_L8K0A3_2.PDF	31/07/2013
Hilli_Form E_Pg4_L8K0A3_1.PDF	31/07/2013

Saved documents

Click on the ***Saved documents*** tab – you'll see the RTF, DOC and DOCx files associated with this case – they all have to have the case key in their filename if they are to appear here.


Show when a case is opened
Case dashboard
Exchange rates: Consider updating
Form E share values: Consider updating
Forms progress | Saved PDFs | Saved documents | Case notes
c:\Class Legal\Quantum\Ver7Beta\Solicitor\Cases\Hillier (demo)\
Name (double click on file to view it) | Date
Hilli_Search order_L8K0A3_5.RTF | 09/08/2013
Hilli_Freezing order_L8K0A3_9.RTF | 09/08/2013
Hilli_Immigration - Information Request order | 07/08/2013
Hilli_Immigration - Information Request order | 07/08/2013
Hilli_Search order_L8K0A3_4.RTF | 06/08/2013
Hilli_Immigration - Information Request order | 06/08/2013
Hilli_Immigration - Information Request order | 06/08/2013
Close
Print case summary

Click on a file and it will open in Word:



Search Order

In the Lincoln County Court **No: 06 D 100306**

The Matrimonial Causes Act 1973

The Civil Partnership Act 2004

The Matrimonial and Family Proceedings Act 1984

The Senior Courts Act 1981

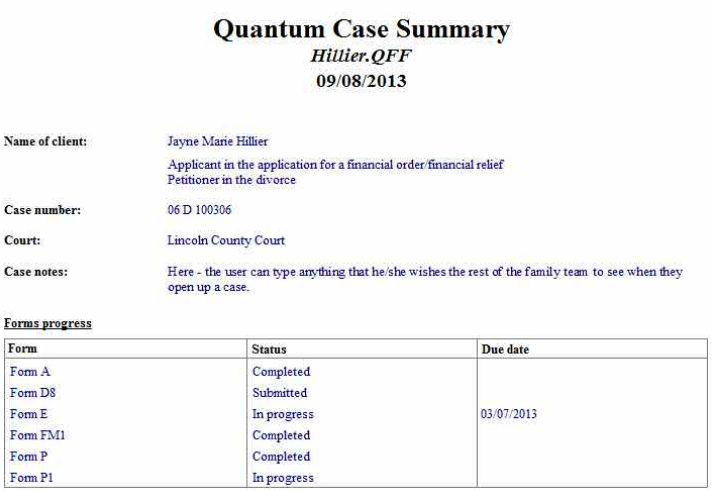
Note that **QUANTUM** only saves to RTF but once you open the document in Word you can save it to DOC or DOCx. Once you save the file in Word the file will automatically be added to your document management system. Remember that once you are in Word you have left **QUANTUM** and we have no control over what you do! (Though of course you will be able to open the file directly from **QUANTUM**.)

Case Notes

Click on the ***Case Notes*** tab. Use this section to leave yourself reminder notes, or instructions for anyone else who may open up the file (i.e. a different fee-earner or secretary).

Case summary

Click on the ***Print case summary*** button, and you'll see a summary of the forms progress, and the PDFs and documents saved for this case.



Quantum Case Summary

Hillier.QFF

09/08/2013

Name of client: Jayne Marie Hillier

Applicant in the application for a financial order/financial relief
Petitioner in the divorce

Case number: 06 D 100306

Court: Lincoln County Court

Case notes: Here - the user can type anything that he/she wishes the rest of the family team to see when they open up a case.

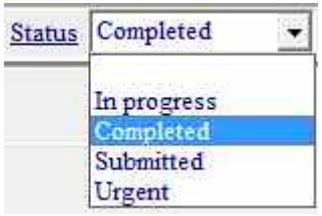
Forms progress

Form	Status	Due date
Form A	Completed	
Form D8	Submitted	
Form E	In progress	03/07/2013
Form FM1	Completed	
Form P	Completed	
Form P1	In progress	

Setting a form's status

Close the ***Case dashboard*** and select any form on the Navigator.

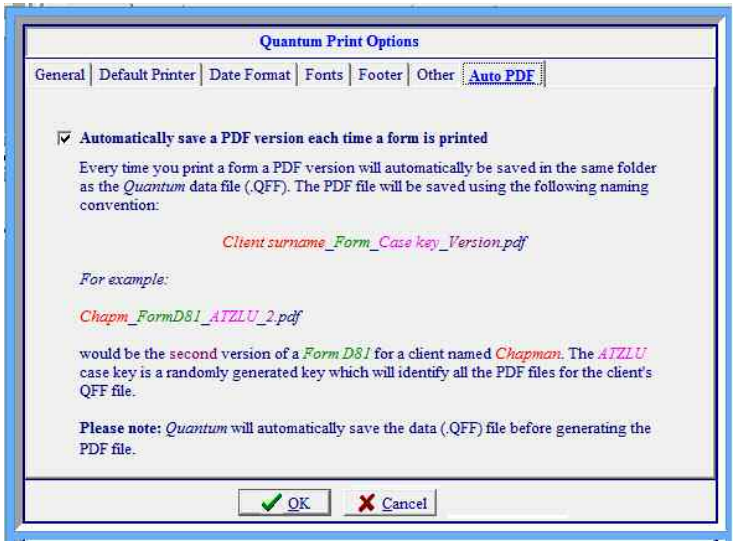
You can set, or change, the status of a form in the top right hand corner of the screen:



Creating PDFs automatically

We suggest you make sure you read the section above, ***A brief run through***, before you read this section: it will make it easier to understand.

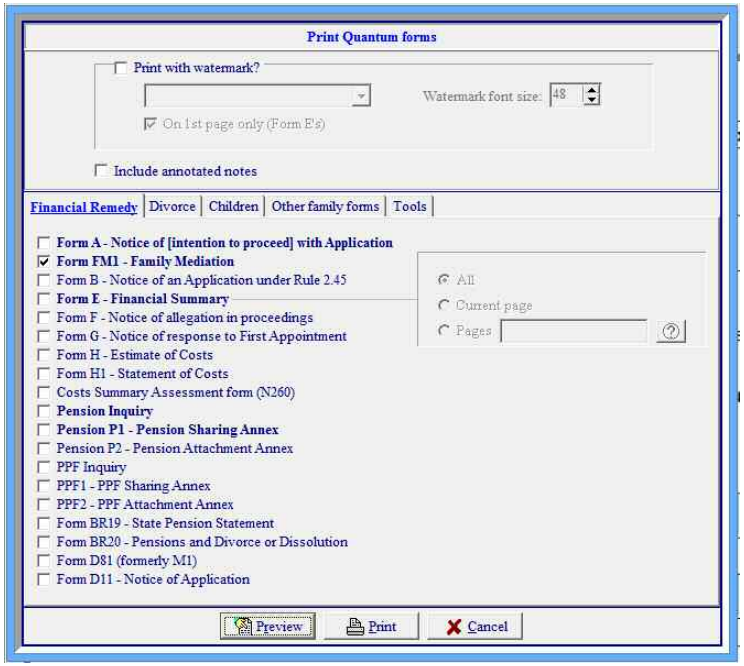
Click on ***File/Quantum Print Options*** and choose the last tab ***Auto PDF***.


Quantum Print Options
General
Default Printer
Date Format
Fonts
Footer
Other
Auto PDF
Automatically save a PDF version each time a form is printed
Every time you print a form a PDF version will automatically be saved in the same folder as the Quantum data file (.QFF). The PDF file will be saved using the following naming convention:
Client surname_Form_Case key_Version.pdf
For example:
Chapm_FormD81_ATZLU_2.pdf
would be the second version of a Form D81 for a client named Chapman. The ATZLU case key is a randomly generated key which will identify all the PDF files for the client's QFF file.
Please note: Quantum will automatically save the data (.QFF) file before generating the PDF file.
OK
Cancel

This feature is turned off by default – if you want **QUANTUM** to create PDFS for you automatically you will have to turn it on.

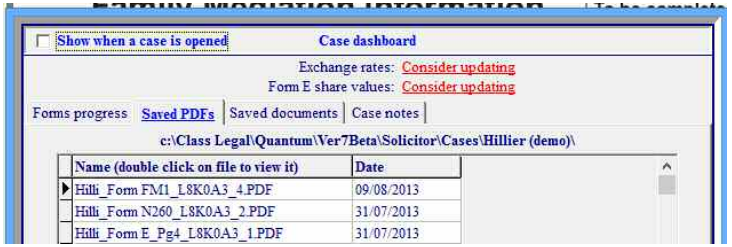
Do this by ticking the box and then close the ***Quantum Print Options*** box.

Now click on a form - let's say FM1 - on the Navigator, and select ***File/Print***.

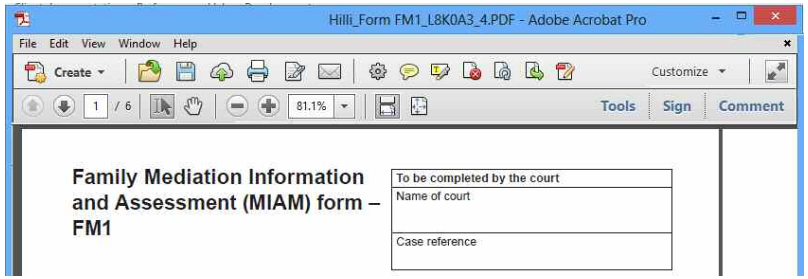

Print Quantum forms
Print with watermark?
Watermark font size:
On 1st page only (Form E's)
Include annotated notes
Financial Remedy
Divorce
Children
Other family forms
Tools
Form A - Notice of [intention to proceed] with Application
Form FM1 - Family Mediation
Form B - Notice of an Application under Rule 2.45
Form E - Financial Summary
Form F - Notice of allegation in proceedings
Form G - Notice of response to First Appointment
Form H - Estimate of Costs
Form H1 - Statement of Costs
Costs Summary Assessment form (N260)
Pension Inquiry
Pension P1 - Pension Sharing Annex
Pension P2 - Pension Attachment Annex
PPF Inquiry
PPF1 - PPF Sharing Annex
PPF2 - PPF Attachment Annex
Form BR19 - State Pension Statement
Form BR20 - Pensions and Divorce or Dissolution
Form D81 (formerly M1)
Form D11 - Notice of Application
All
Current page
Pages
Preview
Print
Cancel

FM1 will already be ticked by default - check that it is and that no other forms are selected for printing. Click ***Print***.

Now click on the blue ***Case dashboard*** button and go to the ***Saved PDFs*** tab.

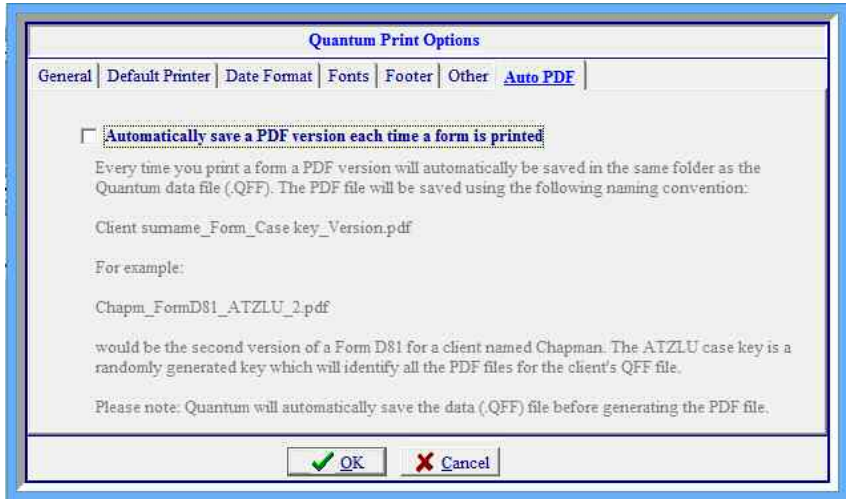


Note that FM1 appears in the list of saved PDFs. Double click on it to view it.



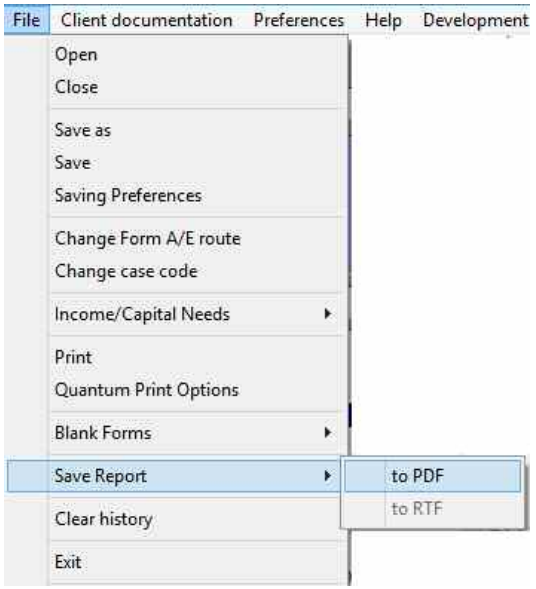
Manually saving your PDFs

Select ***File/Quantum Print Options*** and click on the ***Auto PDF*** tab.

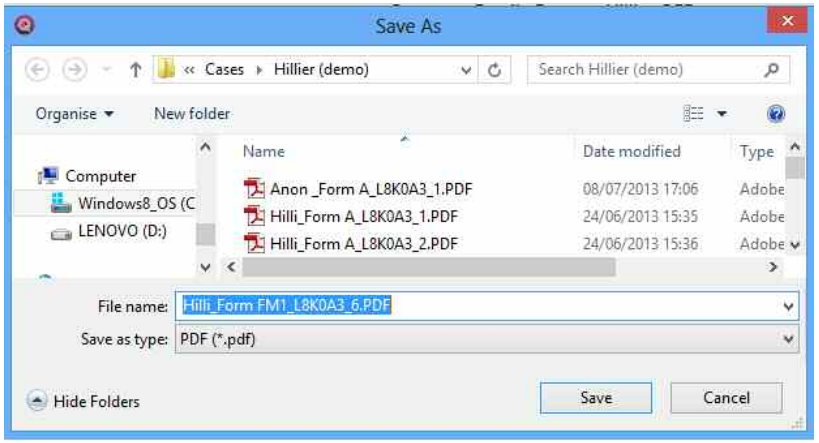

Quantum Print Options
General
Default Printer
Date Format
Fonts
Footer
Other
Auto PDF
Automatically save a PDF version each time a form is printed
Every time you print a form a PDF version will automatically be saved in the same folder as the Quantum data file (.QFF). The PDF file will be saved using the following naming convention:
Client surname_Form_Case key_Version.pdf
For example:
Chapm_FormD81_ATZLU_2.pdf
would be the second version of a Form D81 for a client named Chapman. The ATZLU case key is a randomly generated key which will identify all the PDF files for the client's QFF file.
Please note: Quantum will automatically save the data (.QFF) file before generating the PDF file.
OK
Cancel

Turn the ***Auto PDF*** feature OFF and close the ***Quantum Print*** Options screen.

Select form FM1 on the Navigator and select ***File/Save Report to/PDF***.

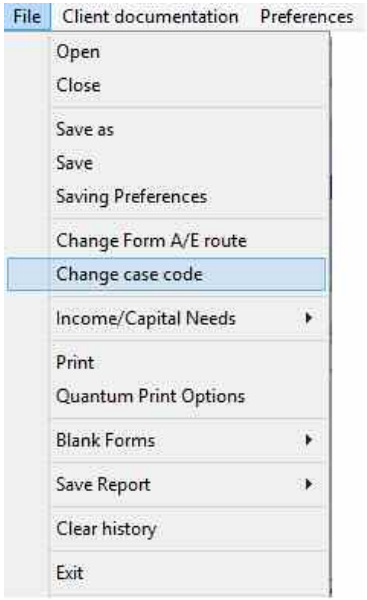


A screen appears asking you to name the file. Note that a default name has been provided. If you keep this name the file will appear in the ***Case dashboard***.



Changing the case code

When you create a new case, **QUANTUM** will automatically generate a case code for it. Go to ***File/Change case code*** to view it.



Of course we can't dictate the way you organise your client files but we would expect all your client's documents to be stored in one folder dedicated to that client - so, for example, Jane Brown's documents will be stored in her client folder and Stuart Jones' documents will be stored in his.

If this always happened then we wouldn't need a case code to link all Jane Brown's saved documents together.

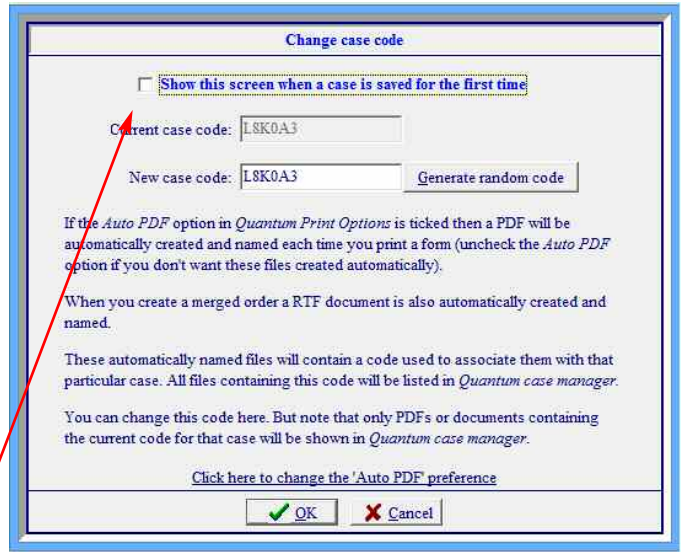
But in some firms documents are stored according to their document type. So Jane Brown's Form E would be stored in a folder named Form E, with the name `JaneBrownFormE.Qff` and Stuart Jones' Form E would be stored in the same folder with the name `StuartJonesFormE.Qff`.

The saved PDF and RTF files are, by default, stored by **QUANTUM** alongside the QFF files – and therefore **QUANTUM** needs to know which ones belong to Jane Brown and which belong to Stuart Jones. This is why we have an automatically generated ***case code***.

When you first save a new QFF file (or re-save a pre-Version 7.2 file), **QUANTUM** will create a random case code and store it along with all the other case data. This is a six digit alphanumeric code.

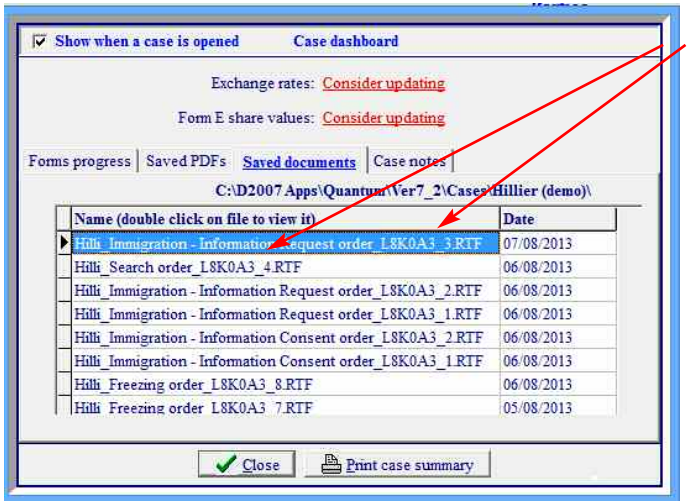
Although this happens happily in the background and automatically you can become involved if you want to and change the case key if you wish!

To do so, select ***File/Change case code*** from the Main Menu.


Change case code
Show this screen when a case is saved for the first time
Current case code: L8K0A3
New case code: L8K0A3
Generate random code
If the Auto PDF option in Quantum Print Options is ticked then a PDF will be automatically created and named each time you print a form (uncheck the Auto PDF option if you don't want these files created automatically).
When you create a merged order a RTF document is also automatically created and named.
These automatically named files will contain a code used to associate them with that particular case. All files containing this code will be listed in Quantum case manager.
You can change this code here. But note that only PDFs or documents containing the current code for that case will be shown in Quantum case manager.
Click here to change the 'Auto PDF' preference
OK
Cancel

If you select 'Show this screen when a case is saved for the first time' then this screen will appear automatically when you save a QFF file for the first time.

Remember that this case code is the linking factor between the documents generated by **QUANTUM** – and that files will only appear in the ***Case dashboard*** if they contain the current code.



Case code in the file names

Client documentation

We have included some of the Court Service forms here, designed to explain the financial remedy process and Form E itself to the layman, in case you find them useful to print out and give to your clients.

You will need to have Acrobat Reader installed to be able to view and print the files.

You can either open the pdf files and print them, or save a copy - maybe to the same directory where you keep a pdf of a blank Form E.

Preferences

Time savers

Child benefit

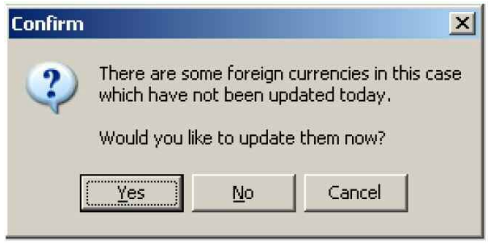
Use this section to set **QUANTUM** to insert the full amount of child benefit in the ***Benefits*** section of your clients' Form E automatically.

You will be sent a **QUANTUM** update every year with the latest child benefit rates installed. (If for any reason they change before you receive an update, copy and paste them using the weblink provided.)

Exchange rates

If you have a foreign currency in your case, when you open it (for an existing case) or when you go to print it (for a new case) a warning message will appear if the exchange rate in the database is more than a day old.

If you say yes, the exchange rate database appears, with the relevant currency or currencies highlighted. Click Modify and then click on the web link provided. Choose the currency (eg South African Rand) and get the rate:


Confirm
There are some foreign currencies in this case which have not been updated today.
Would you like to update them now?
Yes
No
Cancel

VERY IMPORTANT: You must make sure you select Sterling on the left and the other currency on the right – if you do it the other way round, the conversion calculation the program performs will be incorrect.

Always select United Kingdom Pounds on the left

Highlight the exchange rate and COPY (Ctrl C) it to the Clipboard

1.00 GBP = 15.0152 ZAR
British Pound ↔ South African Rand
1 GBP = 15.0152 ZAR
1 ZAR = 0.0665992 GBP
Mid-market rates: 2013-07-31 10:05 UTC

Copy or make a note of the rate, close the web page down and paste the new rate into the Modify exchange rate screen. Click ***OK***. Then print your file as normal.

You can also decide here if you want **QUANTUM** to insert automatically – or not – in your forms the date of the exchange rate.

Share prices

Use this section to set **QUANTUM** to insert automatically – or not - in your forms the date the share value was entered.

You can also set **QUANTUM** to remind you to update share prices, and select how old the valuation should be before the reminder appears.

State pension

Use this section to set **QUANTUM** to insert state pension automatically in the ***State Benefits*** section of your clients' Form E (or the relevant ***Income*** sections in Forms E1 or E2) and selected in Basic Case Information.

Ensure you have the latest state pension rates installed (and cut and paste them using the weblink provided if not).

Your firm's address and fee-earners

Address

Click on this option to enter the name and address of your firm or chambers.

This will be printed in the relevant sections in various forms, such as at the bottom of the back page of Form E, if this option is ticked in the Sworn Statement section.

You may also insert the name of your firm in the "Signed by" part of Forms A and B.

Fee-earners

You can create a database of your firm's fee-earners here. This can then be used when completing Forms H1 and N260 (rather than inputting the same information each time you do a costs form).

Enter the fee-earner's details (name, status, grade and hourly rates) and click ***OK***.

Remember to update the database as your fee-earners and their rates change!

Navigator

Select ***Organise*** to switch the Form E display between sections and pages. ***Expand all*** and ***Collapse*** all show and hide respectively all the subsections of the forms.

Screen appearance

Quantum has been designed to run on a screen resolution of at least 1024 x 768. However, some users may be using an old-fashioned resolution of 800 x 600, which magnifies everything on the screen.

Quantum will ensure that 800 x 600 screen resolution users will be able view everything they need to, but it may be more difficult to use. If your system is able to support higher screen resolutions than you are using, you may wish to take advantage of an option the program provides. This will allow you to run 1024 x 768 while you are in Quantum, but when you exit the program, your usual resolution will be restored.

If your DPI setting is not the default 96 dpi, then you may need assistance. Please ring our help line on **01652 652 222**.

To check your screen settings and whether you can improve upon the appearance of your screen, click on ***Preferences*** then ***Screen appearance***.

PDF/RTF report options

You can decide here whether you want to allow your clients to modify PDF or RTF reports you send them (the default is that they can't).

Income/capital needs options

Select here, both for Form E and Forms E1 and E2, whether to insert a needs template into your blank Form E or unnamed file. See ***Expandable forms/Income*** needs for more information.

Auto name (Word) orders

Select here whether you want to name and save your orders yourself (the default selection) or whether you want **Quantum** to do it automatically for you. See the section on ***Orders*** for further information.

Document management systems

If you have a document management system which **Quantum** supports running on your machine you can integrate it with **Quantum** here. See ***Installation/Integrating with document management systems*** for further details.

Quantum Client

Quantum Client is an innovative add-on to **Quantum Premium**.

It lets you prepare your Form E more efficiently, by allowing your clients to enter as much of the information as they can themselves.

It works in four simple stages:

- Your client downloads the free **Quantum Client** software from the Class Legal website (or from your own site: see below) and then enter as much information as they can
- They then email the file back to you
- You import your data into **Quantum Premium** – and then

validate, amend and prepare your Form E as normal, without the need to retype any data

- You can return the Form E to your client to check, having decided whether to let them change the Form E itself or make annotations onscreen only

What to tell your client

Installation

Either:

1. Tell your client to go to www.quantumclient.co.uk, where they can download **Quantum Client** for free

Or:

2. Copy the **Quantum Client** logo from www.quantumclient.co.uk, and put it on your department web page, linking it to www.quantumclient.co.uk. Then you can simply refer clients to your own website, and they can follow the link from there.

In each case, the client can use the program free of charge for 35 days.

Choosing a Form E route

Quantum Client displays only Form E (not Form E1 or Form E2) on the navigator.

If you do want them to complete a Form E1 or E2, they need to go to ***File/Change Form E type*** and make their selection there. **Quantum Client** makes it clear that they should only do this under specific instruction from you.

How the process works

1. **Client enters the initial data**

   Let's assume you have asked your client to enter the initial data for their case (though you can start the process by sending them a Form E you have partially completed – see step 3 below).

   The client enters as much data as they can, with help from the client specific screens and manual.

   (Note that parts of section 0 and all of sections 5 and 6 have been disabled in **Quantum Client**, as it is more appropriate for the solicitor to enter this data than the client.)

2. **Client emails the file back to you and you amend it**

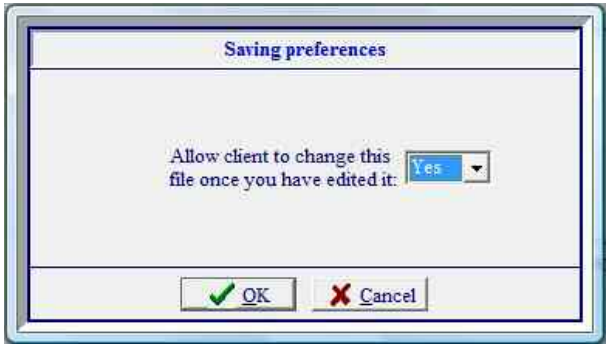
   They email the file back to you as an attachment, and you download it into the appropriate directory.

   You open the case in **Quantum Premium**, and amend and add to the data as required.

3. **If you are returning the file to the client, decide your saving preference**

   Decide if you want your client to be able to amend the Form E itself, or merely to attach comments to it (see the section ***Using the Notes facility*** below).

   Go to ***File/Saving preferences*** and select Yes or No.



If you select 'Yes', when you email the file back to your client, and they open it in **QUANTUM CLIENT**, they can amend the data in Form E as they wish (as well as adding notes). That means if they then send it back to you, and you decide to overwrite your existing file with the one from them, the Form E may well have changed.

If you select 'No', they will not be able to amend the data directly, but only to create notes.

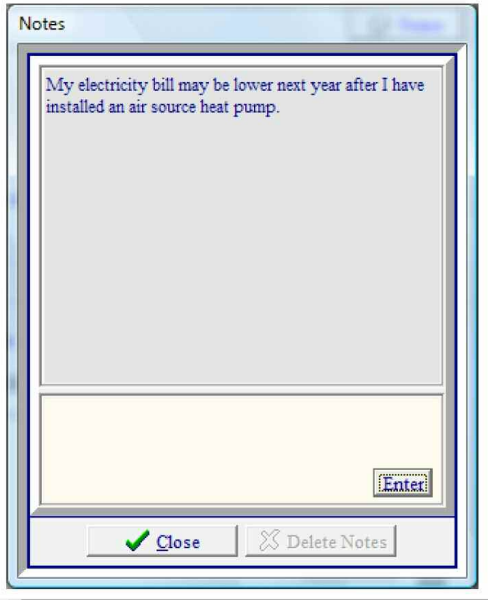
4. **Using the Notes facility**

This is useful if either you or your client want to make comments to each other, without having that text showing on the Form E itself - for example if you want to ask your client for any further information. Think of it as post-it notes stuck onto the form.

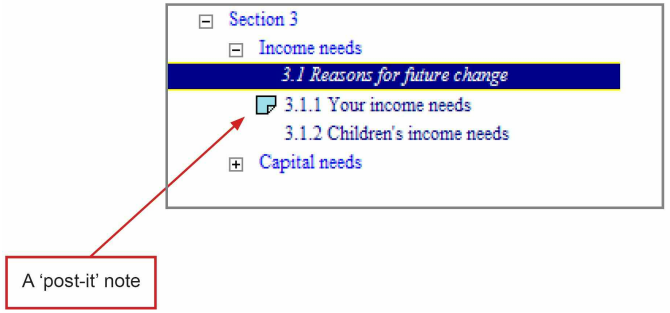
Each of you will be able to create and reply to notes when you receive the file from the other.

Click on the ***Notes*** icon at the top right of your screen.

You'll see that you enter text by typing into the cream box, and then clicking ***Enter***. (You can edit previously entered notes by double clicking on the grey box.)



You will be able to see where there are any outstanding ***Notes*** by looking for the pale blue 'post-it' notes on the ***Navigator***. Click on these ***Notes*** to see any comments – and add to them as you wish.



When you have dealt with a particular note, you'll be able to delete it.

To print the ***Notes*** (so you can keep them on your client file for example), tick the box 'Include annotated notes' when you go to ***File/Print***.